Business Section

FOREIGN TRADE

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FOREIGN TRADE

OTTAWA, AUGUST 7, 1948

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Department of Trade and Commerce

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COVER SUBJECT—British Columbia's mid-summer salmon run provides employment for some 23,000 persons. The largest salmon fleet operates with both net and troll-line, providing fish for twenty canneries. According to the latest information from the Department of Fisheries, the pack to date stands at 251,913 cases. Unexpected large runs of pink and chum salmon are helping to offset the small cycle year run of the sockeye.

National Film Board Photo.

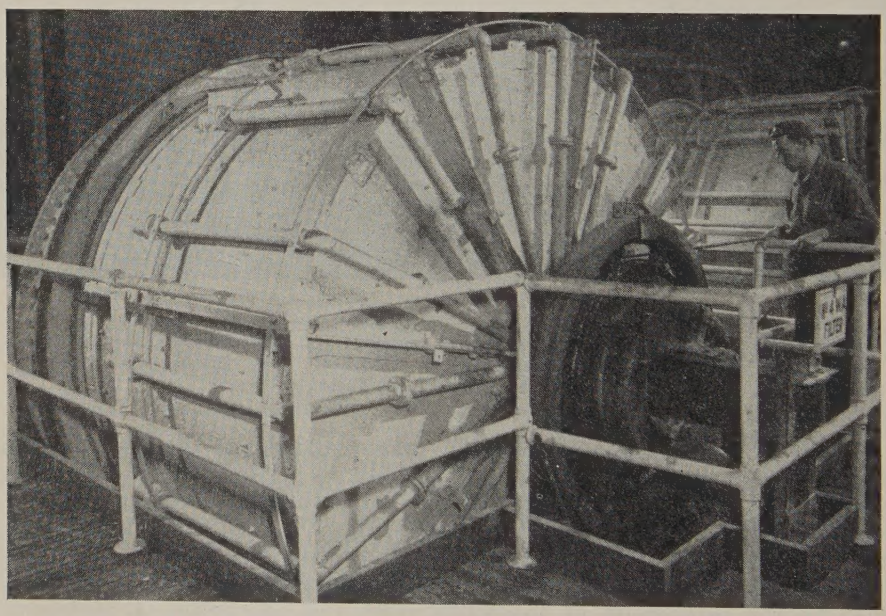
A plentiful supply of natural gas, rich in hydrogen, with adequate power, labour and water, was responsible for the establishment of the plant at Calgary. The steam-methane method was employed. The capacity of this plant is 230 tons of ammonia and 140 tons of ammonium nitrate a day.

At the Welland plant, the basic products were to be organic explosive nitrates, but essential intermediate materials were sulphuric acid, ammonia and ammonium nitrate. A coke-ammonia plant was installed large enough to furnish hydrogen and nitrogen for a daily capacity of 120 tons of ammonia and from this to manufacture 250 tons of ammonium nitrate.

Synthetic Nitrogen Capacity More Than Doubled in 1941

Thus, in 1941, Canada's synthetic nitrogen capacity increased more than twice. With this capacity, the demand for explosive nitrates was satisfied. As the British plants still continued in commission, the increased supplies in 1942 posed the problem of utilization of the existing ammonium nitrate produced. The problem, therefore, was to adapt the ammonium nitrate production of explosive plants for use in agriculture. As originally made for explosives, ammonium nitrate was a material which absorbed water from the air, which made it quite solid and difficult to use. In this condition it was not wanted in a fertilizer plant. It was hard to dispose of this material. To solve the problem, a joint co-operative program between the Canadian authorities and the United States Department of Agriculture was immediately initiated to determine methods of preparing ammonium nitrate so that it would be reasonably acceptable to agriculture as a fertilizer.

In this effort to solve the problem of improving the physical condition, most successful experiments were conducted by a chemist at a plant in Calgary. He allowed a concentrated solution of ammonium nitrate to



Canada—Phosphoric acid, produced by the action of sulphuric acid on phosphate rock, is filtered in these rotary filters at the fertilizer plant of the Consolidated Mining and Smelting Company of Canada, Limited, at Trail, B.C. The phosphoric acid is later converted into phosphate fertilizer.

Courtesy Consolidated Mining and Smelting Company of Canada, Limited.

Canada—S.S. *Lake Nipigon*, owned by the Western Canada Steamship Company, Limited, outward bound from Vancouver with 4,500 tons of fertilizer, 1,450 tons of sulphate, newsprint and generals and 2,000,000 f.b.m. of lumber, ties and piling, carrying a deadweight cargo of 9,300 tons.

drop through the air. Using a tomato can with a perforated bottom, this young man poured ammonium nitrate solution from the top of a four-storey building in the Calgary plant and, to his intense gratification, discovered that the particles that fell to the floor were white rounded beads that looked like tapioca. This process, known as "prilling", was rapidly adopted, first at Calgary, then by the other Canadian Government plants. A special material was used to keep these rounded particles from sticking to each other. The product was packed in waterproof bags, and thus a very high grade fertilizer known as nitraprills, containing about 33 per cent nitrogen, was marketed and met with great favour.

Superior Fertilizing Material Result of Continuous Experimentation

Continuous experimentation has resulted in producing a highly superior fertilizing material. Today, the entire Canadian production of ammonium nitrate fertilizer is in the improved prilled form, consisting of small granular pellets of pure ammonium nitrate dusted with an inert material, usually diatomaceous earth. This assists in preventing caking of the product, and the resulting material is free-flowing and exceptionally easy to handle for direct application to the soil, and as a component in complete fertilizers. The guaranteed analysis is now 33½ per cent nitrogen. Extensive use has shown that Canadian ammonium nitrate is safe to handle and store if special precautions are followed.

This material is produced in Canada by the North American Cyanamid Company Limited and the Consolidated Mining and Smelting Company of Canada Limited, under the respective trade names of "Aeroprills" and "Nitraprills". Packing at all Canadian plants is in five or six-ply paper bags, including at least two plys of moisture-proof, laminated, asphalt paper, to prevent moisture absorption by the material, and this also reduces the possibility of caking.

Ammonium nitrate fertilizer for purposes of transportation is classified as an oxidizing material. Special precautions, under published instructions of the Canadian Board of Transport Commissioners and the National Harbours Board, are taken in its movement by land and water. It offers much the same fire hazard as sodium nitrate and may be considered a vigorous supporter of combustion, due to its liberation of oxygen at moderately high temperatures. For this reason, care should be taken to avoid the possibility of fire involving the material. For the same reasons, the emptied paper bags should be removed to a safe place and burned in small quantities.

Domestic Consumption of Nitrogen Fertilizer Greatly Increased

Canadian consumption of nitrogen fertilizer has increased from some 11,000 tons in 1940 to about 27,000 tons in 1947. It will be noted that on a population and crop acreage basis, Canada still uses relatively little nitrogen

as compared with some other countries. About 90 per cent of it is used as an ingredient of mixed fertilizers and 5 per cent as materials for side dressing mainly the leafy vegetable crops. The estimated tonnages of nitrogen materials for all fertilizer purposes used in the trade year ended July 1, 1948, were: ammonium nitrate, 28,455 tons; sulphate of ammonia, 36,174 tons; cyanamid, 9,654 tons; ammonium phosphate 16-20, 4,385 tons; ammonium phosphate 11-48, 40,250 tons; nitrate of soda, 620 tons; nitrogen solutions, 7,210 tons; and anhydrous ammonia, 570 tons.

With the exception of 11-48 ammonium phosphate, about 90 per cent of these tonnages were used in the five eastern provinces and 10 per cent in the four western provinces of Manitoba, Saskatchewan, Alberta and British Columbia. Of the 40,250 tons of 11-48 ammonium phosphate, about 36,000 tons were used in the three Prairie Provinces mainly for growing sugar beets and grain, principally registered and certified seed grain. The demand for 11-48 ammonium phosphate in the Prairie Provinces has increased rapidly and there is still a serious shortage of this fertilizer for that part of Canada as well as of the drill attachments for applying it.

In the trade year 1946-47 there were used in Canada, according to the Dominion Bureau of Statistics, a total of 657,282 tons of all fertilizers, and of this 561,464 tons were mixtures. It is a notable fact that of the total tonnage of mixed fertilizers used, 176,647 tons were of 2-12-6 grade and 164,986 tons were of 4-8-10 grade. The amount of 2-12-6 and 4-8-10 sold was 341,633 tons, or about 60 per cent of the total tonnage of mixed fertilizers. The 2-12-6 is by all odds the most popular fertilizer for grain and farm crops and the 4-8-10 the potato and garden crop fertilizer. Other countries may be using more nitrogen for these crops, but so far Canada has not found such necessary.

There is now relatively little organic nitrogen used for fertilizer purposes. Small amounts are supplied in some tobacco fertilizers and a relatively small tonnage of bone meal, tankage and blood is sold, mainly in the florist and backyard garden trades.

Canadian exports of nitrogen under International Emergency Food Council allocations during the trade year ended June 30, 1948, are estimated at 132,422 tons of nitrogen as compared with the total domestic consumption of 27,000 tons.

Fertilizer Supplies Under World Allocation

From 1943 to date the world supply of fertilizer nitrogen, exclusive of the U.S.S.R., has been subject to recommended allocations.* Under this inter-governmental plan. the total world production of nitrogen is pooled. After allowing for the indigenous production retained by the exporting countries, the balance remaining represents the world exportable surplus. It is the excess of import requirements over the amount of the world exportable pool that represents the world shortage.

commercial nitrogen than was available in 1947-48, when it amounted

Until 1947, five countries only were the net exporters of nitrogen for fertilizer purposes, that is, countries that produced more commercial nitrogen than they used. They were Belgium, Canada, Chile, Norway and United Kingdom. Switzerland also exported small tonnages. In 1948, Austria and Italy were added as net exporters. For 1948-49, the estimated exportable surplus of commercial nitrogen available from these eight countries will be about 738,042 metric tons nitrogen. This is exclusive of the ordnance grade produced in the United Kingdom and the United States. This is more to 587,200 tons. On the other hand, total world requirements, exclusive

* Committee on Fertilizers of the International Emergency Food Committee of the Council of FAO. The Committee consists of representatives of 16 countries of which Canada is a member.

Canada—Prilled ammonium nitrate fertilizer, which is among the leading fertilizers manufactured in this country and shipped to many foreign lands.
Courtesy North American Cyanamid Limited.

of the U.S.S.R., for commercial nitrogen in 1948-49 have increased to 3,066,600 tons from 2,782,700 tons in 1947-48. The very important place of Canada in contributing to the available supply of the world surplus for 1948-49 is shown in the following figures:

Estimated World Exportable Surplus of Nitrogen Fertilizer

	Estimated exportable surplus, metric tons, 1948-49
Chile	276,445
Canada	136,600
Belgium	90,000
Norway	88,770
United Kingdom	67,350
Italy	54,277
Austria	20,500
Switzerland	4,100
Total	738,042

The significant change from prewar exports is that North and South America now account for a much larger proportion of the world export pool. In prewar years, Germany, for instance, was a net exporter of nitrogen, while at present Germany is a net importer. This basic world problem of the current nitrogen shortage is discussed in the report of the Secretary-General of IEFC to the Fifth Meeting of the IEFC Council, November, 1947, as follows: "Production in Germany, Japan, Italy and Korea has declined steeply; although production in the United States, Canada and Belgium has more than doubled as compared with prewar, and production in the United Kingdom has risen almost as steeply, the increase in these countries is barely sufficient to compensate for the decline in the other countries."

That the world pool of exportable nitrogen for 1948-49 is not nearly large enough to meet world requirements needs to be underscored. If present world price levels are maintained sufficient to purchase the nitrogen needed, it is quite unlikely that there will be enough nitrogen fertilizer in 1948-49. Without the very substantial war and postwar increase in production in Canada and the United States, the world supply position today would be much worse than it is; in fact, without this additional tonnage, world supply problems would be almost insurmountable.

Greek Requirements Listed for Third Quarter of Current Year

Proposed purchases totalling $80,164,070 allocated under funds provided by United States for reconstruction and relief—Goods imported through American Mission Aid to Greece, by the Greek Government or by private trade.

PROPOSED purchases totalling $80,164,070 are allocated in the third quarter of the Greek Import Program this year, under funds provided by the United States for reconstruction and relief to Greece under the supervision of the American Mission Aid to Greece (AMAG). The requirements are divided into seventeen classifications, which are set forth in the following table, which indicates whether the goods shall be imported direct by AMAG, by the Greek Government (State) or by private trade:

Allocations to Greece for Third Quarter

(In total dollar equivalent)

	AMAG	State	Private	Total
Animals	....	....	....	....
Foodstuffs, feeds, beverages	$19,432,000	$ 7,119,300	$ 8,553,550	$35,104,850
Fuel and POL	....	6,617,600	1,210,000	7,827,600
Forest products and derivatives thereof	....	....	3,413,700	3,413,700
Metals	1,950,000	....	1,762,000	3,712,000
Metal implements and other metals goods	....	....	1,356,700	1,356,700
Non-metallic minerals and manufactures	....	....	265,250	265,250
Textiles	....	....	6,064,320	6,064,320
Hides and leather	....	....	2,250,000	2,250,000
Rubber and rubber products	....	....	287,500	287,500
Machinery, equipment and spares	....	....	6,320,000	6,320,000
Vehicles and transport equipment	....	....	3,445,000	3,445,000
Pharmaceuticals, drugs and medical supplies	725,000	....	1,500,000	2,225,000
Chemicals, paints and dyes	....	4,184,000	2,183,500	6,367,500
Miscellaneous industrial raw materials	....	....	237,600	237,600
Electrical, photographic, optical and scientific supplies and equipment	....	....	640,000	640,000
Miscellaneous	....	50,000	597,050	647,050
Total	$22,107,000	$17,970,900	$40,086,170	$80,164,070

Further details may be obtained on application to the Foreign Trade Service, Department of Trade and Commerce, Ottawa, quoting file 16219. (See also *Foreign Trade,* May 1, 1948.)

Food Procurement for Miners in Bizonia To be Handled by German Importers

Two current procurement programs consolidated—Administration office to be reorganized—Selection of incentive commodities to be approved by miners—Method of financing imports unchanged.

By B. J. Bachand, Canadian Economic Representative

FRANKFURT, June 25, 1948.—Another substantial step forward in turning over food procurement to German importers, the Joint Export-Import Agency has announced, is being taken with the consolidation of the Bonus "B" and Miners' Incentive procurement programs. Effective July 1, 1948, imports of food under the Miners' Incentive Scheme will be procured in the same general manner as for the Bonus "B" system and through the same central Bonus Office. This procurement will be handled through German importers.

Up to now, imports for the Miners' Incentive Scheme have been procured directly by JEIA after due consideration of the wishes of the Miners' Selection Committee of the German Coal Mining Management (DKBL), which recommended items to be imported. For Bonus "B" imports, however, the Bonus "B" Office in Frankfurt, after consultation with an advisory committee consisting of trade union and chamber of commerce representatives, screened prospective import applications and recommended to JEIA the issuance of licences for the approved applications.

Import Procurement Procedure Unchanged

The Bonus "B" practice has worked out so satisfactorily, JEIA officials stated, that it was decided to follow the same general procedure with regard to Miners' Incentive imports. The Bonus "B" Office is to be reorganized as the Bonus Office, with a manager and principal deputies appointed by the German Economics Administration (VFW) in consultation with the Administration for Food and Agriculture and the DKBL; one or more permanent representatives of the Miners' Selection Committee of the DKBL will be included.

Initial screening and selection of incentive commodities to be imported for the miners will be continued by the Miners' Selection Committee of the DKBL after due consideration of the wishes of the miners. The Committee's recommendations will be forwarded to the Bonus Office through the committee's representative there and will be handled by the Bonus Office in the same manner as recommendations for Bonus "B" imports.

Import recommendations will be classified as for Bonus "B" or miners' purchases, and separate licences will be issued for each category. There will be no change in the method of financing the imports. Bonus "B" commodities will continue to be bought from the accumulated fund of 5 per cent of export proceeds, and the Miners' Incentive items from the proceeds of coal sales.

The Miners' Incentive Scheme is based on a sliding scale, starting at 18 cents per ton for 225,000 tons gross clean daily output and increasing to 31 cents for 325,000 tons. Supervision over distribution of the imports will continue to be exercised as heretofore: by the Bonus Office for Bonus "B" items and by the Miners' Selection Committee for Miners' Incentive commodities.

As of June 10, 1948, a total of $4,500,000 had been made available for Bonus "B" purchases and, as of May 1, 1948, more than $11,110,000 worth of goods had been contracted for under the Miners' Incentive Scheme.

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Extensive Development of Peanut Acreage Planned for Australia

Undeveloped area in Queensland selected for project — Plantings have expanded rapidly in recent years—Prewar supplies from India no longer available in sufficient volume — Australian growing conditions favourable — Queensland crop purchased by Peanut Board.

By Dr. W. C. Hopper, Commercial Secretary for Canada (Agricultural Specialist)

SYDNEY, June 15, 1948.—Peanut production in Queensland is being considered on a large scale, tracts of undeveloped country having been inspected by the British Food Mission that recently toured Australia. No information concerning this project is yet available, though it is known that every effort is being made to increase the production of peanuts. Those grown in this country prior to 1946 were for human consumption, and peanuts considered unsuitable for edible purposes by the Queensland Peanut Board were used for the production of oil. The output in 1946 was expanded, and 20 per cent of the crop was sent to the oil mills for extraction. Twenty-five per cent was used in this manner in 1947, this arrangement being made possible by an adjustment in prices between edible and oilmilling quality peanuts. The Queensland Peanut Board maintains that it would not be economical to produce peanuts exclusively for the production of oil.

Peanut plantings in Queensland have expanded rapidly in recent years. The average prewar acreage was 14,500, but in 1945 a total of 32,000 acres was planted and an estimated 52,800 acres in 1946. During the current planting season about 66,000 acres were planted, and this would give a crop of 35,000 tons in shell under normal circumstances. It is estimated that an area of 108,000 acres would be required to make Australia self-sufficient.

Peanut Oil an Important Ingredient of Margarine

Peanut oil is used for the preparation of salad oils and cooking fats and the production of margarine. The Commonwealth Statistician only supplies figures of the quantity of peanut oil used in margarine manufacture, which was less than half of total prewar consumption, but has increased considerably since then. Australian production of peanut oil increased by over 50 per cent during the war years.

This increase in oil production was only made possible by a large increase in peanut imports from India during the war years. In 1945-46, imports from India fell to a fraction of previous imports on account of India's food shortage, and in 1946-47 they ceased altogether.

Australian Imports of Peanuts

	1,000 Lbs.		1,000 Lbs.
1934-35	2,482	1941-42	16,756
1935-36	3,397	1942-43	14,711
1936-37	2,817	1943-44	9,787
1937-38	1,221	1944-45	24,689
1938-39	5,084	1945-46	1,712
1939-40	7,775	1946-47	no imports
1940-41	14,341		

The energetic steps undertaken by the British Government to expand peanut production are probably partly based on a belief that India, Britain's

Australia—City hall of Brisbane, capital of Queensland. Costing £1,000,000, the building's 350-foot tower dominates the city sky line. Every effort is being made to increase peanut production in Queensland. Plantings have increased from a prewar average of 14,500 acres to 66,000 acres this year.

previous main supplier, will be unable to resume exports at the prewar level (933,000 tons per annum) in the future. During the 1946 food shortage, India prohibited the export of peanuts.

Australian Growing Conditions Favourable

Peanuts require a long, warm, growing season, an ample and well-distributed rainfall, and a relatively dry autumn. These conditions are found mainly in Queensland and the Northern Territory. Production on the north

15023—2½

coast of New South Wales has been small and irregular. Australian production has centred around Kingaroy, Queensland, but a small area is usually devoted to peanuts in the Northern Territory.

The nuts are attached under ground to stems of the peanut plant, not the roots. When the nuts reach the proper size, the plants are pulled by hand and stacked in small piles, where they remain for two to six weeks to dry out. Heavy, compact soils cannot be used for peanut growing because, under present methods of harvesting, peanuts grown in such soils would not be brought to the surface when the plants are pulled but would become detached from the plants and remain in the soil. For highest yields, peanuts must be grown in rotation. Putting the land for three years in Rhodes grass followed by two years in peanuts is a recommended rotation. In such a rotation a ton of peanuts per acre might be expected, but under continuous peanut production, which is now the usual practice, yields of about 1,000 to 1,500 pounds of Virginia and 900 to 1,000 pounds of Spanish peanuts are being obtained.

Water erosion, largely because of lack of organic matter in the soil, is becoming a serious problem in soils where peanuts are grown continuously.

Entire Crop Purchased by Peanut Board

The Queensland Peanut Board acquires the entire peanut crop grown in Queensland. There are about 1,000 growers, who arrange for delivery of their crops at their own expense to the Board's plant at Kingaroy, where they are cleaned, shelled, and graded. The prevailing price is about $3\frac{3}{4}$ pence to 4 pence per pound in the shell at the plant.

The Board has a large number of timber and concrete bins, resembling cylindrical silos, for storing several thousand tons of peanuts. The Queensland Peanut Board was established in 1924.

All the facilities used by the Peanut Board, such as bins, machinery, etc., are owned by the Queensland Peanut Growers' Association. The Board of Directors of this Association is the same as the members of the Peanut Board. The Peanut Board deducts a levy of $\frac{1}{4}$ pence per pound from growers' returns, which is used to pay for the facilities required for handling the peanut crops and to constitute a revolving fund, so that shares in the Association owned by persons who no longer ship peanuts to the Board may be retired.

Peanut growers are given an initial payment on delivery and receive a final payment when the peanuts are sold. The funds for this initial payment are obtained from the bank.

Peanut shells are of little value, but the tops of the peanut plants left with the growers are valuable as feed for live-stock. It is stated that these tops are equal in value for feeding to good alfalfa hay.

The bags used by the Board for shelled peanuts contain about 130 pounds of the Virginia type and 140 pounds of the Spanish type.

In view of the prominent place that correspondence, the sending of samples and literature assumes in the activities of an exporter, it is recommended that Canadian exporters provide themselves with a copy of the Canadian Official Postal Guide published by the Department of Public Printing and Stationery at a cost of $1.00 per copy. Postal information may of course be obtained from local post offices, but the above publication covers all phases of postal services in a manner suitable for ready reference. (*See our ABC of Canadian Export Trade, page 24.*)

Financial Position Of South Africa Under Review by the Government

Volume of imports from abroad and the steadily rising cost of living source of concern—Gold and sterling reserves decreased—Declining gold production and current foreign exchange position raises speculation of limited import control—Control over refugee capital instituted—Importers warned against overbuying.

By D. S. Armstrong, Assistant Commercial Secretary for Canada

JOHANNESBURG, July 2, 1948.—Increasing competitive conditions, leading to more cautious buying policies on the part of consumers, retailers and wholesalers, continued in South Africa during the first six months of 1948 without much apparent effect on price levels. While business conditions generally were relatively unchanged from those existing at the close of 1947, they were better than the corresponding 1947 period. The period was significant, however, for a number of measures affecting foreign exchange and international trade and for the attention paid to the country's international balance of payments.

Distributive Trades Back to Normal Conditions

After a reasonably good Christmas season, frequent clearance sales have assisted in keeping trading activity at a satisfactory level. There were few shortages of consumer goods, stoves and cotton piece-goods, being important exceptions of interest to Canada. Compared with the same period in 1947, there has been a marked return to "normal" trading conditions during the past six months. A general feeling of confidence in the future has replaced the uncertainty which was prevalent this time last year, although some trades suffered temporary setbacks in the post-general election period since May. Some large departmental stores have cut their buying programs for 1948 by 10 per cent, especially in such lines as fashion goods and toys, where overbuying was most common in the past two years.

New Price Control Measures Contemplated

Despite the Union's enviable exchange position during the past two years, and the consequent flow of goods from abroad, the steadily rising cost of living has been a source of concern to the Government. The wholesale price index in January stood at 1695 (base 1938=1000) and was only slightly lower at the end of June. The wholesale index for imported goods, however, has risen steadily to almost 1900. The retail price index for food for May was 1592 as compared with 1515 in May a year ago.

The old government inaugurated a voluntary price reduction scheme in February, which it was hoped, by application of a standard formula, would substantially reduce the gross profits of manufacturers and importers alike and lead to lower retail prices. With the change of government, this scheme has been abandoned, and the new government is expected to decrease profit margins by price control orders rather than through voluntary co-operation of traders.

Bank Deposits Higher But Credit Tighter

Bank deposits reached a record £416,360,000 in May as against £348,700,000 in the same month in 1947. Advances and discounts also reached a new record level of £126,722,000. A large part of the increase

in bank deposits can be attributed to the heavy influx of United Kingdom capital, especially in the early period of the year. There are signs of tighter credit conditions. The banks have become less liberal in the matter of loans for expansion of inventories in certain lines, including credits for the acquisition by manufacturers of some raw materials. The accounts of public companies published in June were generally less favourable than a year ago, thus reflecting the return to competitive conditions. The Standard Bank of South Africa's index of business activity, however, has continued its upward trend and is now near 2200 (base 1938 equals 1000). This rise, which has been almost uninterrupted since February, 1947, was mainly due to the steady increase in the value of building plans passed by the larger municipalities as building supplies became easier. Building societies (better known as mortgage houses in Canada), however, have been unable to meet all the demands for loans because of insufficient private investors capital. High price levels, the availability of previously scarce goods, and the diversion of money into commercial and industrial projects are reasons given for the dearth of capital. This situation has already affected building operations of small builders and the construction of private dwellings.

Gold and Sterling Holdings Decline

The Union's gold holdings, which were valued at £187,117,000 at the end of December, 1947, amounted to £91,020,000 on July 2, 1948. While the decrease is largely accounted for by the transfer to the United Kingdom in February of £80,000,000 in gold in fulfillment of the loan made in 1947, the additional drain of about £16,000,000 in this period has reduced the reserve continuously towards the statutory minimum level. The Reserve

South Africa—Central section of Durban, one of the principal ports of the Union, through which passes a large volume of the country's imports and exports.

Courtesy South African Railways and Harbours.

South Africa—Cape Town, surmounted by the mass of table mountain. The current foreign exchange position in the face of declining gold production is causing some concern.

Courtesy South African Railways and Harbours.

Bank's sterling holdings at the high level of £82,000,000 at the end of 1947 had declined to about £61,000,000 on July 2, although this resulted mainly from one transaction involving the transfer of and payment for the Victoria Falls and Transvaal Power Company, purchased by the Electricity Supply Commission, a quasi-government organization, towards the end of June.

Union's Import Deficit Causing Concern

The Union's current foreign exchange position in the face of declining gold production, and the country's traditional dependence on gold for the maintenance of its import trade, has resulted in much press and private speculation on the need for limited import control, especially over foreign purchases of luxury goods. No recent South African trade figures are available, but trade returns of Canada, United States and the United Kingdom, the three leading supplying countries, covering the first three months of the year, indicate that the falling-off in purchases from abroad, forecast at the turn of the year, has not materialized. Approximate comparative figures are given below, covering the trade between South Africa and the countries mentioned during the first quarter of 1947 and 1948:

Trade With the United States, the United Kingdom and Canada

	1947 Jan.-Mar.	1948 Jan.-Mar.
United States—		
Exports to South Africa	$ 97,032,000	$111,598,000
Imports from South Africa	19,022,000	34,427,000
Balance against South Africa	$ 78,010,000	$ 87,169,000

Trade with the United States, the United Kingdom and Canada—*Concluded*

	1947 Jan.-Mar.	1948 Jan.-Mar.
United Kingdom—		
Exports to South Africa	£ 20,810,000	£ 26,973,000
Imports from South Africa	4,289,000	8,450,000
Balance against South Africa	£ 16,521,000	£ 16,523,000
Canada—		
Exports to South Africa	$ 19,507,000	$ 11,738,000
Imports from South Africa	620,000	639,000
Balance against South Africa	$ 18,887,000	$ 11,099,000

The above table is, of course, an incomplete summary of the country's international trading account, but it clearly indicates the continuation of a large import deficit in spite of appreciably increased exports to the United States and the United Kingdom.

Importers Warned Against Overbuying

Some "scarce-buying" abroad doubtless took place during the first six months of the year and the possibility of further restrictions has probably accelerated importations of certain lines, especially luxury goods. To reduce to some extent the amount of advance-spending on imported consumer goods, sales by banks of forward exchange were limited in February to purchases of producers' goods and materials. While the main purpose of the restrictions was to impose on importers of non-essential goods the risks of foreign exchange fluctuations, the move appears to have been motivated by a lack of sound business caution by importers. To quote the Deputy Governor of the South African Reserve Bank, "The action taken was mainly directed towards slowing down, not the importation of goods from hard-currency countries as was wrongly surmised, but at slowing down the tempo of long-dated contracts at present price levels". Later figures will reveal how effective these restrictions were. On June 30, the Minister of Economic Development of the new government also warned importers against panic buying at high prices in the face of a possible price decline in the not too distant future. He also stated that "the Minister of Finance was not unduly perturbed about the gold position, which is much stronger than statistics indicate". Importers were also warned that any further deterioration in the exchange position would be determined by their actions concerning excessive and possibly injudicious buying. For political and economic reasons, as well as administrative difficulties, the government is anxious to avoid import control. Future developments, apart from the trend of imports, especially from hard-currency areas, and the gold production, will also depend on the inflow of capital seeking investment in this country's industrial and mining development.

Official Control Over Refugee Capital Instituted

Much of the capital seeking a refuge in South Africa is known to be "funk money" and has resulted in an agreement between the Union and the United Kingdom on the application of restrictive measures to prevent these balances from reaching unwieldy proportions. Capital transfers are now only permitted if they represent: the proceeds of sterling area assets realized by South African residents in the sterling area; the cost of South African securities; subscriptions to capital issues by residents in the sterling area; or transfers of immigrants' personal capital in amounts of not more than £10,000.

Restrictions Imposed on Export Trade

A regulation promulgated on January 23, 1948, under the Exchange Control Regulations is designed to prevent countries suffering from a shortage of hard currency from obtaining from the Union, against payment in sterling, goods which they were unable to purchase directly. South Africa pays for her imports from dollar areas in hard currency, which is obtained by selling gold. If these imports are re-exported and paid for in sterling, the adverse effect on the Union's gold reserves might well be serious. The prohibition also applies to the re-export of goods which have been manufactured in the Union if 50 per cent or more of their factory cost is represented by materials or parts imported from countries outside the sterling area. Special care is being taken, however, to maintain the flow of goods to prewar markets which certain Union industries have developed in various African territories. The industries affected include those which are based on the processing or assembling of imported materials or parts, such as the motor car industry.

Cereal Crop Estimates Satisfactory

Crop estimates for the 1947-48 crop years are, on the whole, extremely favourable. Maize, the staple food of the native, 80 per cent of the population, is presently estimated at 107,000,000 bushels, which will be the second largest crop on record and will mean a surplus of probably 16,000,000 bushels, some of which is scheduled for export to Europe. The 1947-48 wheat crop has been officially estimated at 17,500,000 bushels, 2,700,000 bushels above the 1946-47 crop, but still about 6,300,000 bushels short of the Union's requirements. Although wheat is being imported from approved I.E.F.C. sources, white bread may not be possible for some time. Other crops, including wattle bark and extract, deciduous fruit and sugar, are expected to equal or pass those of last year. The citrus fruit crop, however, is expected to be 10 per cent smaller because of hail damage.

New Parliament Meets in August

The last session of the Union's Parliament was prorogued on March 24 and was followed by the general election of May 26. As the session was short, relatively little legislation was passed. The General Agreement on Tariffs and Trade Act was passed in the closing hours of the last session and came into effect on June 13. The budget, normally brought down in April, was confined to an interim supply measure to give the administration sufficient funds to operate until the next session of the House, which is to meet for a six weeks period in August and September, mainly for the purpose of considering the budget of the new government. The results of the election have had little apparent effect on business or economic conditions and official speeches of members of the new Cabinet stress the need for policies leading to a sound and stable development of the Union's industries and resources.

Foreign Trade Index

The Index to "*Foreign Trade*" for the Six Months ending December, 1947, is being distributed to all subscribers of this publication. Anyone who has not received their copy by July 31, 1948, should notify the Publicity Division, Department of Trade and Commerce, Ottawa.

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Sea and Air Services Now in Operation Between Belgian Congo and Canada

Shipping service in operation at Montreal in summer and Halifax in winter—Matadi, on Congo River, is main port—Delays often encountered on shipments to interior—Approximately 3,000 miles of railways are in operation—Radio, telegraph and telephone communication facilities available.

By L. H. Ausman, Canadian Government Trade Commissioner

(Editor's Note—This is the fourth in a series of seven articles on the Belgian Congo, prepared for *Foreign Trade*. The previous articles appeared in the July 10th, July 24th and July 31st issues.)

LEOPOLDVILLE, May 28, 1948.—Matadi, on the Congo River, is 95 miles from the Atlantic and is the only port in the Belgian Congo of any importance to Canadian shippers. Other ports are Banana, Boma and Ango Ango. These ports are regularly served by vessels from the United States, the United Kingdom, Belgium, Sweden, the Netherlands and South Africa. Until recently, Canadian goods reached Matadi via New York, but a Canadian service from Halifax in winter and Montreal in summer is now in operation.

The port of Matadi serves the lower Congo area and, through transhipping facilities at Leopoldville, the entire Congo and Kasai river territory as far as Stanleyville and Port Francqui. Delays in transit are very considerable to such destinations as Elizabethville, Albertville, Usumbura (in Ruanda-Urundi), Costermansville, and surrounding territories. It is not unusual for goods to take two months or more to travel the 1,200 or 1,500 miles to points in the Katanga and other eastern provinces. Lobito Bay in Angola is the exit point for most of the copper from Katanga province and goods from overseas for this area enter here. To a lesser extent, the more expensive routes from Beira, Lourenço Marques or even Durban are used. For Ruanda-Urundi and the Costermansville area, the best port of entry is Dar-es-Salaam, in Tanganyika, while for the north east of the Colony, Mombasa in Kenya is most satisfactory. At present, congestion in inland transportation facilities from these Indian Ocean ports causes delay in forwarding goods.

Traffic through the principal ports of Matadi and Boma in 1946 was as follows:

	Matadi Tons	Boma Tons
Merchandise imported	197,264	18,036
Merchandise exported	385,116	74,734

Congo River Has Vast Drainage Area

The Congo river has a drainage area of about one and one-half million square miles and, with its tributaries, is navigable for 7,500 miles, of which almost 2,000 miles are accessible to vessels of 800 and 1,200 tons. Due to rapids in the river, Leopoldville, some 345 miles from the sea, is the transhipment point for almost all goods entering or leaving the Colony via Matadi or Boma. Lake Tanganyika, and to a smaller extent the other lakes on the eastern border, Albert, Moero and Kivu, are important links in the transportation system of the Belgian Congo.

Approximately 3,000 miles of railways were in operation in 1946. By far the largest mileage is owned by three private groups of companies with lines in the east of the Colony, linking these areas with river and lake transportation systems. However, the short 250-mile link between

Leopoldville and Matadi is a vital factor in the economy of the country and is operated by the state-owned Office d'Exportation des Transports Coloniaux (Otraco) which also operates the port of Matadi and almost all the river transport on the Belgian side. In July, 1948, celebrations will mark the 50th anniversary of the completion of this railway, the first in the Congo.

Great Strides Made in Road Construction

During the past quarter century the Belgians have made great strides in building roads throughout the Colony, particularly in the eastern part, where the tributaries to the Congo river do not hinder this development as they do in the central and western sections. The mileage of roads in use in 1946 was about 59,000 as compared with 47,860 in 1939. The number of vehicles in circulation in 1946 was: motor cars, 4,851; trucks, 6,714; trailers, 90; tractors, 103; motorcycles, 1,187; and bicycles, 56,214.

Passenger, mail, and express service by air from the United States is provided by Pan American Airways, operating two planes a week in each direction between New York and Johannesburg. From Europe, service is provided by the Belgian Sabena, the French Air France lines and the Dutch K.L.M. Sabena flies each way six times a week. The Portuguese Divisao dos Transportes Aereos links Angola with the Belgian Congo and Sabena operates a network of lines throughout the Colony and to Rhodesia and South Africa. Other lines operate schedules within the Colony and to Belgium by way of the Nile Valley.

Mail from Canada Routed Via the United Kingdom

Both air and surface mail from Canada is routed via the United Kingdom. Airmail takes on an average eight to twelve days to reach Leopoldville. First class surface mail takes about a month, while third class and parcel post require from one to two months for delivery. Canadian exporters are reminded that the airmail postage is 25 cents per quarter ounce and that the surface rate is five cents for the first ounce. Frequently, surface mail letters are received bearing insufficient postage.

Wireless cable service with Canada is available via London and is reasonably prompt, although receipt cannot usually be anticipated the same day in the eastward direction, due to the time difference. There are 51 telegraph offices and 46 radio stations operated by the government for internal communication. There are 13 international circuits.

With five international wireless telephone circuits, communication is available with South Africa and Europe. As yet there is no service to North America.

There are five broadcasting stations in the Congo, including the 50 kilowatt world transmitter of the Belgian National Broadcasting Service. The total power is 61·5 kilowatts. In 1946 licences were issued for 4,952 radio receiving sets. These are now estimated to be about 5,500.

One of the important factors to be taken into account in any survey of export markets is the customs tariff. It may be so high as to render prohibitive to Canadian products a market which otherwise would be of definite interest. On the other hand, preferential rates favourable to Canada may be the deciding factor in favour of Canadian goods in markets which are highly competitive. Tariff conditions, therefore, are at present of vital importance in any survey of export markets. (*See our ABC of Canadian Export Trade, page 59.*)

15023—3½

Lower Swedish Industrial Output Result of Acute Labour Shortage

Rising wages and full employment characterized the labour scene last year—Situation eased by the import of manpower from Italy, Hungary, and Sudeten Germany—In spite of a strong bargaining position, labour unions pursued a policy of moderation in wage demands.

By F. H. Palmer, Commercial Counsellor for Canada

(Editor's Note—This is the second in a series of articles by Mr. Palmer on economic conditions in Sweden during the past year, prepared for *Foreign Trade*. The first article appeared in the July 24th issue.)

STOCKHOLM, March, 1948.—Rising wages and full employment characterized the Swedish labour scene throughout 1947. In spite of the favourable bargaining position that a continued acute labour shortage gave the trade unions, they pursued a policy of moderation in wage demands, with the result that no serious strikes or shut-outs occurred during the year. Foreign labour was brought into Sweden from Italy, Hungary, and Sudeten Germany in an attempt to ease the crippling shortage of labour which continually held back production in industry.

The total payroll of Swedish industry had increased during 1946 by about 20 per cent. This rise was attributed to wage increases rather than to any increase in employment. Although the "collective agreements" throughout Swedish industry showed increases in wage rates of only 4 per cent, the 20 per cent increase was doubtless due to higher rates being paid in certain industries because of shortages of labour and consequent transfers of labour to such industries from the relatively poorer-paid branches of industry.

Wage Agreements Featured Up to Ten Per Cent Increases

Some progress had been made in settling some outstanding labour disputes, by the end of January, 1947, without recourse to strike or lock-out. The new collective agreements, implying increases in wage scales of between 8 and 10 per cent, gave hopes of greater stability in labour conditions, at least for another year.

The ultimate settlement of these wage schedule disputes was spread over several weeks, particularly the agreement with employees in the engineering industries, which affected some 130,000 persons. All settlements stipulated fairly large increases in wages, but there were many additional difficulties which still had to be faced, especially the prominent shortage of labour. Manufacturers decided to continue to try to raise their output by increasingly efficient methods, while hope was expressed in industrial circles that the immigration of labourers from Italy and Hungary would perceptibly alleviate the shortage of help.

Acute Labour Shortage Threatened Production

The shortage of labour in Sweden amounted to no less than 50,000 workers, by March, with industrial production continuing at very high levels, the index of production reaching 130, compared with 100 in 1935. No change in the rate of output was expected in March until factory workers showed the usual inclination to switch over to other fields of industrial, agricultural, lumbering or other seasonal activity during the summer.

Labour shortages were even more serious in May. Whereas there were 81 applicants for every 100 jobs available in May, 1946, there were 77 applicants in April, 1947, and only 66 job-seekers in May, 1947. An attempt to solve the labour problem brought 500 Italian workmen to Sweden during the summer, while 600 Hungarians, including 500 farm labourers, were expected before the autumn.

There were increasing complaints that labour forces were less efficient, and of decreases in production as workers moved from one employer to another. Production was expected to decline to even lower output rates per man-hour during the holiday period.

Unions Were Moderate in Wage Demands

A great many collective wage and terms-of-employment agreements were valid only to the end of the year. The Trade Unions announced at the end of the summer that their demands would be moderate, no doubt expecting that decreasing imports would have the effect of increasing domestic purchasing power. The General Federation of Swedish Trade Unions felt that interest rates should not be increased as this would affect rents and general price levels, and jeopardize the principle of moderation which was to be the main objective of the trade unions.

The anticipated decline in production of Swedish industry materialized during August. The index declined two points to 129, which was still higher than the index of 125 for August, 1946. The decline was attributed to the summer holidays and to the fact that labour took on other occupations to a greater extent than usual, or extended their holidays if they did return subsequently to their normal places of employment. The weather during the entire summer was the best Sweden had experienced for years, a certain inducement to prolongation of holidays.

Imported Workers Eased Labour Shortage

The end of the holidays, and the increasing effect of import restrictions, seemed to ease the labour shortage. With restrictions also being applied to building and to investment-industrial expansion, there was some hope for a further alleviation. Another attempt to solve the labour problem was the signing of an agreement with the British and American occupation authorities in Austria, which provided for the transfer to Sweden of labourers from Sudeten Germany, then residing in Austria. Swedish industry had expressed the desire to obtain about 5,000 of these labourers, but the final number was much lower.

New System of Flour Control Introduced by the United Kingdom

London, July 22, 1948.—(FTS)—A new system of control of the United Kingdom flour trade will begin on July 25, when bread and flour rationing come to an end. The Minister of Food has announced that to replace the present system of rationing, the government will introduce a scheme under which the deliveries of flour from mills will be controlled administratively by the Ministry in such a way as to keep the rate of offtake at approximately the rate of the past twelve months. This rate of offtake is estimated to be sufficient to provide all the bread and flour needed for human consumption.

In addition, an order has been issued prohibiting the sale or purchase of more than 28 pounds of flour by retail at any one transaction. The purpose of these two measures is to prevent as far as possible the use of flour for the feeding of livestock.

Canadian Exports of Turnips to United States Greatly Increased Over Prewar

Shipments to United States increased from an average of 2,317,000 bushels in 1935-39 to an average of 3,344,000 bushels in 1943-47—Ontario, with output of approximately 600,000 bushels a year, is major Canadian producing area for export, with Prince Edward Island also supplying limited quantities.

PRODUCTION of turnips in Canada for export is confined almost entirely to Ontario and Prince Edward Island, the former providing a substantially larger volume. Yearly production in Ontario is approximately 600,000 bushels. The major production area is centred around Guelph and includes the counties of Brant, Perth, Waterloo and Wellington. Other major production areas are the counties of Huron, Lambton, Middlesex, Peel and York. Queen's county, in the area contiguous to Charlottetown, accounts for practically all the Prince Edward Island production.

The major outlet for Canadian turnips has always been the United States, with Newfoundland accounting for most of the quantities listed under "other" destinations, as indicated in the following table:

Canadian Exports of Turnips

	1935-1939 average (fiscal year)	
	Bushels	Value
United States	2,317,000	$ 672,000
Others	17,000	8,000
Total	2,334,000	$ 680,000
	1943-1947 average (calendar year)	
United States	3,344,000	$2,417,000
Others	40,000	24,000
Total	3,384,000	$2,441,000

The bulk of exports is carefully graded, trimmed and waxed prior to shipment and rigidly inspected by Department of Agriculture officials. In consequence, there is an excellent and continuing demand for this commodity. Under the Geneva Agreement, the import duty into the United States was reduced from 12½ to 6¼ cents per 100 pounds. It is too early, to judge whether exports will be materially increased by reason of this reduction. An indication of the possible beneficial effect of the lower duty is the increase in value of $438,000 in exports to the United States in the first three months of 1948 over the same period in 1947.

Floods Affect Production of Canadian Hops

Early reports indicated increased acreage over last year, principally in British Columbia. Later trade reports are that flood damage in the Fraser Valley has seriously damaged plantings and that production will be considerably less than previously estimated.

Northern Spy Root Stock Used in Victoria

Sydney, June 15, 1948.—(FTS)—Northern Spy vegetatively propagated is the commonest rootstock for apple trees in the State of Victoria. It is also used in Tasmania and other states. The principal advantage of this stock is that it is resistant to woolly aphis. In fertile, well-drained soils, satisfactory apple trees are usually produced on Northern Spy stock.

Canadian Exports, by Areas

NOTE: Throughout this bulletin, totals represent unrounded figures, hence may vary slightly from rounded amounts.

GEOGRAPHIC AREAS	June			January-June		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES	(Millions of Dollars)					
United Kingdom and Europe	26·1	81·1	55·9	163·6	363·4	365·4
America	2·4	16·7	10·6	10·4	66·8	54·9
Africa	1·3	10·8	8·0	9·2	47·8	40·2
Asia	0·6	8·1	4·4	4·6	29·6	21·7
Oceania	5·5	10·0	6·9	25·1	44·8	27·4
Total British Countries	35·9	126·7	85·8	212·9	552·3	509·6
FOREIGN COUNTRIES						
United States and Possessions	20·3	82·3	110·3	118·8	485·0	648·9
Latin America	1·4	8·9	10·9	9·2	64·0	59·2
Europe	7·3	46·8	23·0	29·6	178·1	143·9
Other Foreign	1·0	7·8	4·4	16·5	49·0	39·4
Total Foreign Countries	30·0	145·9	148·7	174·1	776·1	891·5
TOTAL DOMESTIC EXPORTS	65·9	272·7	234·5	387·0	1,328·5	1,401·1

Canadian Exports, by Countries

Country	June			January-June		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES	(Thousands of Dollars)					
Europe:						
United Kingdom	25,598	76,195	55,169	160,929	352,639	360,370
Eire	491	4,282	581	2,480	7,941	4,330
Gibraltar	.....	26	.....	2	194	3
Malta	21	558	123	210	2,586	671
Total Europe	26,110	81,061	55,873	163,621	363,360	365,374
America:						
Newfoundland	1,005	5,529	5,002	3,509	22,506	23,540
Bermuda	138	648	324	667	2,697	2,163
Barbados	117	1,536	615	502	4,974	2,807
Jamaica	377	1,803	666	2,195	9,218	7,600
Trinidad and Tobago	364	3,846	1,945	1,756	14,864	8,612
Bahamas	188	362	243	954	1,882	2,134
Leeward and Windward Islands		1,298	593		4,207	2,926
British Honduras	27	198	196	134	808	521
British Guiana	156	1,525	977	697	5,634	4,628
Falkland Islands	.....	.....	.....	.....	.....	.....
Total America	2,372	16,745	10,561	10,414	66,790	54,931
Africa:						
Northern Rhodesia	1,185	41	80	7,701	174	226
Union of South Africa		9,468	6,960		40,157	34,433
Other British South Africa		2	.....		8	2
Southern Rhodesia	73	647	290	647	2,794	1,296
Gambia	2	10	7	11	57	25
Gold Coast	14	145	248	57	592	1,012
Nigeria	6	156	104	36	1,539	510
Sierra Leone	20	99	19	107	468	518
Other British West Africa	.....	.....	.....	.....	2	.....
British Sudan	1	4	.....	191	214	37
British East Africa	39	198	253	400	1,747	2,127
Total Africa	1,340	10,770	7,961	9,150	47,752	40,186

Canadian Exports, by Countries—*Continued*

Country	June			January-June		
	1938	1947	1948	1938	1947	1948
BRITISH COUNTRIES—*Con.*	(Thousands of Dollars)					
Asia:						
India	156	5,121	2,303	1,492	17,362	10,748
Pakistan			754			891
Burma*	8	75	.....	87	539	.....
Ceylon	30	361	101	126	1,496	887
Aden	11	62	120	57	421	560
Malaya and Singapore	192	873	573	1,521	3,417	4,082
Other British East Indies	1	.....	8	4	9	16
Hong Kong	182	468	578	1,282	2,713	3,722
Palestine	19	1,172	7	55	3,650	836
Total Asia	599	8,132	4,444	4,624	29,607	21,742
Oceania:						
Australia	3,888	5,853	4,626	17,095	30,200	17,611
New Zealand	1,586	3,965	2,220	7,799	14,138	9,247
Fiji	22	216	47	179	459	437
Other Oceania	1	2	55	42	11	93
Total Oceania	5,497	10,036	6,948	25,115	44,808	27,388
TOTAL BRITISH COUNTRIES	35,917	126,744	85,788	212,926	552,317	509,621
FOREIGN COUNTRIES						
United States and Possessions:						
United States						
Alaska	20,043	81,975	109,785	118,003	481,982	646,049
American Virgin Islands	13	30	50	52	191	143
Guam	4	25	9	16	77	61
Hawaii	.....	27	19	3	64	161
Puerto Rico	169	190	267	629	1,380	1,643
	36	94	177	139	1,303	851
Total United States and Possessions	20,265	82,341	110,307	118,842	484,997	648,908
Latin America:						
Argentina	555	1,779	1,110	2,395	16,766	9,777
Bolivia	17	52	124	56	316	498
Brazil	232	1,403	3,508	1,867	11,430	12,463
Chile	31	423	467	334	2,341	1,674
Colombia	96	691	458	524	5,642	4,659
Costa Rica	5	223	75	53	1,124	482
Cuba	99	685	1,161	496	3,373	5,411
Dominican Republic	1	117	158	20	1,072	526
Ecuador	7	83	164	60	1,051	787
Guatemala	22	60	137	62	839	777
Haiti	8	103	60	97	442	321
Honduras	142	1,157	887	1,395	5,832	8,005
Mexico	3	26	67	52	316	320
Nicaragua	23	205	178	180	1,110	1,181
Panama	.....	5	4	6	92	53
Paraguay	85	118	199	481	2,413	1,315
Peru	4	48	112	23	381	570
Salvador	4	78	102	232	852	1,074
Uruguay	11	132	371	122	1,360	1,786
Venezuela	77	1,544	1,577	698	7,233	7,517
Total Latin America	1,422	8,932	10,919	9,153	63,985	59,196
Europe:						
Albania	.....	68	.....	5	315	40
Austria	.....	200	108	8	1,686	2,385
Belgium	1,019	9,072	1,295	3,079	22,923	14,579
Bulgaria	.....	.....	.....	6	12	93

*See Foreign Countries from January 1, 1948.

Canadian Exports, by Countries—*Concluded*

Country	June			January-June		
	1938	1947	1948	1938	1947	1948
Foreign Countries—*Con.*	(Thousands of Dollars)					
Europe—Con.						
Czechoslovakia	532	2,587	552	1,470	6,614	8,981
Denmark	460	1,307	798	646	2,214	2,160
Estonia	.....	.....	.....	1	.....	.....
Finland	63	263	149	193	593	1,489
France	1,025	3,197	5,995	4,393	35,233	32,089
Germany	773	2,276	1,522	5,906	5,368	6,850
Greece	639	452	511	1,037	3,551	6,163
Hungary	.....	209	36	1	845	458
Iceland	2	345	115	8	1,619	1,297
Italy	86	4,487	2,806	678	19,604	15,297
Latvia	3	.....	.....	156	.....	.....
Lithuania	28	.....	.....	95	.....	.....
Netherlands	1,259	9,498	2,602	4,608	31,816	20,052
Norway	453	2,799	3,575	3,400	10,063	12,339
Poland	54	3,869	692	480	9,233	2,855
Portugal	15	381	430	78	2,130	1,469
Azores and Madeira	.....	48	.....	2	230	63
Roumania	1	23	24	23	43	176
Soviet Union	73	6	13	604	4,325	95
Spain	.....	17	34	19	650	384
Sweden	716	3,090	424	2,355	9,044	4,544
Switzerland	85	1,591	1,338	352	5,565	9,444
Yugoslavia	2	1,042	3	5	4,446	644
Total Europe	7,288	46,827	23,022	29,608	178,122	143,946
Other Foreign Countries:						
Abyssinia	.....	35	7	.....	73	44
Afghanistan	.....	.....	.....	.....	33	24
Belgian Congo	6	89	166	50	611	921
Burma*	.....	.....	18	.....	.....	104
China	244	2,710	1,486	1,309	18,956	16,012
Greenland	.....	.....	8	.....	56	30
Egypt	26	983	95	167	6,657	3,313
French Africa	135	672	78	398	1,756	1,560
French East Indies	2	.....	5	13	571	258
French Guiana	1	101	21	4	230	103
French Oceania	7	16	6	46	63	30
French West Indies	26	432	4	85	1,144	500
Madagascar	1	6	18	4	48	359
St. Pierre and Miquelon	54	224	70	121	549	533
Iraq	2	382	8	26	1,632	650
Tripoli	.....	.....	.....	.....	5	1
Other Italian Africa	.....	.....	.....	.....	7	.....
Japan	249	6	588	10,039	415	2,279
Korea	.....	2	10	.....	22	20
Liberia	1	12	22	14	82	76
Morocco	13	108	52	52	704	468
Netherlands East Indies	54	581	742	379	3,373	3,607
Netherlands Guiana	4	139	106	18	449	428
Netherlands West Indies	25	148	293	115	716	1,293
Iran	.....	73	51	38	289	274
Philippine Islands	65	577	172	749	7,670	3,315
Portuguese Africa	127	249	207	951	1,133	2,070
Portuguese Asia	.....	1	1	.....	47	40
Siam	1	56	69	11	272	257
Canary Islands	2	2	.....	2	45	12
Spanish Africa	.....	.....	.....	.....	53	42
Syria	2	162	30	28	672	191
Turkey	.....	65	104	1,903	711	633
Total Other Foreign	1,047	7,831	4,437	16,522	49,044	39,447
Total Foreign Countries	30,027	145,928	148,689	174,123	776,142	891,498
Total Domestic Exports	65,944	272,672	234,476	387,050	1,328,459	1,401,119

*See British Countries prior to 1948.

Haiti Has Market Possibilities For Medium-Priced Shoes

Several agents looking for Canadian connections—Haiti's one shoe factory produces low-grade footwear—Low purchasing power of populace restricts volume of leather imports.

By R. G. C. Smith, Commercial Secretary, Canadian Legation

(Editor's Note—Mr. Smith is at present on tour in Canada, prior to proceeding to Rome on posting in September.)

HAVANA, May 10, 1948.—Although the market for leather in Haiti is restricted by the low purchasing power of the people, placing imported leather beyond the reach of most of the population, some agents have expressed interest in handling a Canadian account. The outlet for boots and shoes, while limited to a medium-priced line, is relatively more promising, and there are several responsible agents looking for Canadian connections, provided they can meet the limitations of price and stylings in this market. Medium quality McKay sewn men's shoes, selling at not more than $5 per pair, f.o.b. factory, can be sold.

There is a local tanning industry capable of producing the low-quality leathers that are used exclusively by the single boot and shoe factory in Haiti. However, there are a number of individual shoemakers who turn out a few pairs of "hand-made" shoes, and use mostly imported leathers for their uppers. As the local industry cannot supply anything but the lowest-quality boots and shoes, there is a small demand for medium-priced shoes from abroad.

Imports of leather and boots and shoes are actually below the prewar levels, as the following statistics show:

Imports of Hides, Skins and Footwear

	Average 1937-41*	1945-46*	1946-47*
		(Kilos)	
Tanned Hides and Skins			
Total	10,861	7,217	6,881
United States	....	3,492	4,377
Cuba	....	2,384	1,761
Canada	....	245	743
		(Pairs)	
Boots and Shoes			
Total	40,700	9,703	36,389
United States	....	7,098	32,241
Cuba	....	786	2,152
Canada	....	1,546	1,890

* Fiscal years, ending September 30.

The falling-off in imports of leather may be explained by the growth of the local tanning industry, and the fact that the single boot and shoe factory uses only local leather. The sudden jump in imports of boots and shoes in 1947 is undoubtedly the direct reflection of prosperous conditions during that year, along with the better availability of shoes from abroad. This increase is not likely to be permanent, as the local boot and shoe industry is able to supply the bulk of the domestic demand. There is some doubt as to the accuracy of the 1947 figure, as the official statistics show this in kilograms. However, the boot and shoe statistics have always been shown in pairs, and the value of imports would seem to indicate that the listing as kilograms is a typographical error.

A detailed breakdown of the leather imports appears to be most misleading, as splits and calf skins are shown to be the only leathers imported in any volume. Actually, it is probable that cowhide sides, patent and white bucks are the principal leathers imported. The imports from Cuba are puzzling, and probably consist of cowhide side leathers and a little sole leather.

Local Industry is Primitive

Although the domestic industry turns out nearly all of the sole leather used locally, and all of the upper leather used in Haiti's only factory, the leather is of very low grade. However, it suffices for use in the factory, which is also comparatively primitive. There are about three tanners in Haiti that produce sole and side leather. One of these tanners also turns out a very low-grade split, and poor kid skins that are used as linings.

Because the market for even a medium-quality shoe is so limited, no local factory could possibly compete with imported shoes in this field. Some better-quality shoes are made by numerous shoemakers, who use imported leather exclusively, except for the sole leather. The use of plastics for women's shoes is very popular in Haiti.

Leather Imports Handled by Wholesalers

All of the leather imported is handled by importers, of which there are about four, handling mostly leather and shoemakers' supplies. Some of these wholesalers place orders direct with foreign tanners, but there is also some leather sold by commission agents. Terms are usually cash against documents, but letters of credit may sometimes be secured if the shipper is well known. Imported boots and shoes are sold by commission agents to a great number of importers who buy in small lots to meet the limited market for a medium-quality shoe.

United Kingdom Trading Position Improved in June

London, July 22, 1948.—(FTS)—United Kingdom exports in June showed a further improvement and while imports also increased slightly, there was an overall lessening of the adverse trade gap. United Kingdom exports in June amounted to £134,000,000, which was an advance of $4,100,000 over May and only £3,400,000 short of the record reached in July, 1920. Shipments abroad of raw materials increased by £700,000 to £6,700,000 largely due to rising coal exports. In fully manufactured goods, exports were valued at £115,000,000, £2,700,000 better than the previous month. The most striking result appeared in the category of "vehicles (including ships and aircraft)" which went up in the month by £1,500,000 to a record of £20,900,000. Within this group, ships show an expansion of £2,100,000 and reached £3,700,000. Upon the other hand, aircraft fell by £700,000.

Imports in June, compared with May, increased by £1,100,000 to £177,100,000. Paper-making materials (mainly woodpulp) attained a record of £6,000,000. Raw cotton imports at £13,500,000 were the highest since 1925.

The visible adverse balance of trade fell by £2,200,000 to £38,300,000, the lowest figure since February.

Prompt shipment is one step towards a repeat order. If delay is to be expected, write an explanation at once. Don't wait to be asked for it. (*See our ABC of Canadian Export Trade, page 45.*)

New Zealand to Control Imports From Canada in Current Year

Can no longer afford to buy on 1947 scale—Canadian goods admitted if no sterling-area substitutes—Imports in 1947 2½ times prewar value—Exports twice as large—Trade figures reflect rising international prices.

By P. V. McLean, Commercial Secretary for Canada

WELLINGTON, June 15, 1948.—New Zealand imports from Canada during the past year were valued at £11,579,725, which represents a substantial increase over those for 1946, which were £4,656,000. Exports to Canada last year totalled £3,059,660, compared with £2,803,000 in 1946. As this country is now forced to live close to her income, imports from Canada on the same scale cannot be expected in 1948. It has been indicated that every effort will be made to conserve dollars, and import licences will be issued for Canadian commodities only if they are absolutely essential and unprocureable within the sterling area.

Total trade of £258 million during the calendar year 1947 established a record per capita trade value of £143. Exports were over twice the prewar value and imports multiplied over two and one-half times. The record excess of exports over imports of 1946 was reduced almost to the vanishing point by the improved supply situation which boosted the value of imports by over 80 per cent. The following table compares current trade with that of prewar years.

Trade of New Zealand

Average	Exports	Imports (Millions)	Balance of trade
1936-38	£ 60.6	£ 51.9	£+ 8.7
1939	58.0	49.4	+ 8.7
1946	101.3	71.46	+29.7
1947	129.4	128.7	+ .7

Rising Prices the Dominant Factor in Value of Trade

The record values of commodity trade established last year have been mainly a result of climbing international prices, although the quantities of goods traded have also increased. The following index numbers indicate that price-rises have dominated the moderate real increase in the flow of commodities.

Indices of Value and Volume of Trade

(Base: 1936-38 average=100)

	Exports		Imports	
	Value	Volume	Value	Volume
1939	96	98	95	94
1946	167	112	138	75
1947	214	119	248	115

All export figures did not show the general increase in value. There were decreases in some important commodities such as grass and clover seed, rabbit skins, and canned meat. Cheese, meat and wool exports were all materially above those in prewar years, while butter exports, although higher in value over the last few years, were slightly below prewar quantities. A very substantial rise in export prices accounted for the remarkable increase in the hides, pelts and skins item, shown in the following table.

Exports of New Zealand

(Selected Commodities)

	Butter	Cheese	Frozen meat (Millions)	Wool	Hides, pelts and skins
1936-38	£16.3	£ 5.5	£14.3	£14.9	£ 3.2
1946	19.8	8.4	23.2	26.6	5.7
1947	28.8	11.6	29.4	31.9	10.4

Imports of New Zealand

	1946	1947 (Millions)	Increase
Food, drink and tobacco	£10.2	£15.4	£ 5.2
Apparel	1.8	5.3	3.5
Textiles, fibres and yarns	13.8	26.6	12.8
Oils, fats and waxes	4.2	7.2	3.0
Metals and manufactures	8.2	12.9	4.7
Machinery	11.5	18.4	6.9
Paper and stationery	3.7	7.5	3.8
Drugs, chemicals and manures	4.5	6.0	1.5
Vehicles and accessories	5.4	13.2	7.8
Other classes	8.3	16.1	7.8

China Experienced Large Growth in Labour Unionism Following the War

An estimated 8,090 unions functioning at present with a membership of 4,900,000—General labour union formed by the Chinese Government to control unions—Industrial or Factory Union and the Craft or Home Industry Union are affiliated—Labour policy laid down by Sixth National Convention of Kuomintang.

By L. M. Cosgrave, Commercial Counsellor for Canada

(Editor's Note—This is the last in a series of six articles on economic conditions in China, prepared by Mr. Cosgrave for *Foreign Trade,* and is the first general review of that country presented since 1940. The other articles appeared in the July 3rd, July 10th, July 17th, July 24th and July 31st issues.)

SHANGHAI, May 6, 1948.—Though there was little organized labour in China before the last war, as this is understood in the Western Hemisphere, it is estimated there are 8,090 unions functioning in this country at present, with a membership of 4,900,000. Following the defeat of Japan, the Chinese Government quickly realized the importance of controlling these unions, and a general labour union was established. It is closely associated with the Kuomintang, and has two affiliated unions, one being the Industrial or Factory Union, and the other the Craft or Home Industry Union. Also associated with these unions are the local workers' welfare committees, headed by members of the C.C. Clique, or the more reactionary elements within the Kuomintang.

The closest approximation to organized labour before the war would be the guilds and the apprentice system. However, there were one or two small textile unions, which were started during the early 'thirties under the direction of Miss E. Hinder, now with the British Embassy in China.

Although the establishment of unions was prescribed by Dr. Sun Yat-sen, the Chinese National Government did nothing about the movement up to 1940. However, these two unions forced the government to realize the potential strength for good or evil of such organizations. The Sixth National Convention of the Kuomintang laid down a labour program in 1945, and that policy is still in force.

Little or No Political Threat from Unions

With a structure of this type, it can be safely assumed that there is little or no political threat from these unions. Communists are scattered throughout the body of the union, but the upper strata is controlled entirely by the Central Government. Closely associated with the whole is the Bureau of Social Affairs, whose head, Mr. Wu Kai-shien, is a member of the C.C. Clique. Mr. Wu acts as arbitrator and it is within his power to reorganize the whole union should their policy be at variance with the government.

In Shanghai there are approximately 530,000 organized workers and the labour unions are made up as follows: public utilities, 180,000; textile workers, 180,000; tobacco union, 42,000; printers' union, 14,000; and food and drink, 32,000.

It must be borne in mind that although these unions are becoming more closely associated with the government, nevertheless the result has been an improvement in the general working conditions and although the cost of living has risen to abnormal heights, the actual take-home pay of the individual worker is more than before the war.

The greatest threat to the union today is the constant dismissals, as factories, becoming short of raw materials, have had to cut down the number of employees.

Prior to the war, many foreign firms had subsidiary factories in China to take advantage of the cheap labour and the low cost of living. This is no longer the case as wages have increased over 200 per cent in terms of U.S. currency and general items such as transportation, food, etc. have gone up accordingly, while, possibly due to wartime Japanese influence, labour today does not do as efficient work as prior to the war.

National General Labour Union to be Formally Established in Nanking

The National General Labour Union is to be formally established in Nanking, the preliminary work of organization having been under the guidance of Mr. Tsao Pei-tsu, Director of the Department of Organization and Trade in the Ministry of Social Affairs. The constituent members of this organization are the National Unions or Federations and the Provincial or Municipal General Labour Unions, twenty-five of which have made a request for its formation. The law requires that a minimum of twenty-one requests be made to the Ministry of Social Affairs before a National General Labour Union can be established. The Ministry, therefore, has given permission to the National Body to be organized. The formation of this Body has a certain international significance, since it will no doubt be from amongst its officials that Chinese labour representatives at international conferences will be drawn.

The Department of Organization and Training which is giving guidance in forming the Union is a Kuomintang organ of control over labour.

Drawback Regulations, administered by the Customs Drawback Division, Department of National Revenue, Ottawa, provide for the return of ninety-nine per cent of all duties and taxes paid on imported materials which are used or directly consumed in, wrought into, or attached to articles manufactured in Canada and subsequently exported. As a result of these provisions, the sale of Canadian goods throughout the world is not handicapped by the payment of duties on materials imported into Canada. (*See our ABC of Canadian Export Trade, page 61.*)

Leather Industry in Netherlands Becoming More Concentrated

Progress since 1880 characterized by geographical and technical concentration, increasing mechanization, great variety of products, and increasing foreign sales—Province of North Brabant most important area—Products, generally, of good quality.

By N. Riemeyer, Office of the Commercial Counsellor, Canadian Embassy

THE HAGUE, May 18, 1948.—Four factors characterize the progress since 1880 of the leather industry of Holland, which is one of the oldest trades in this country, namely: Geographical and technical concentration of the leather and shoe industries, increasing mechanization, the great variety of products, and increasing foreign sales.

In the first half of the 19th century the Netherlands leather industry was spread over the whole country. Around 1860, however, the tanneries in the province of North Brabant became more and more important, whereas those located in other parts of the country showed a steady decline. This situation was caused by geographical factors, such as the sandy soil of North Brabant, the presence of numerous brooks with water containing few bacteria and fairly large forests with sufficient supplies of tan.

In addition, there was a further concentration in a technical-economic respect. Until the second half of the 19th century, the tanneries were small family enterprises. Around 1850, however, the shoe-manufacturers started tanning for their own requirements, as a result of which the number of tanneries increased. The following table illustrates both the increasing concentration in North Brabant and the growing size of the productive unit. A decline in the number of factories is accompanied by a rise in total employment.

Leather Tanneries in Holland

Year	North Brabant	Elsewhere	Total	No. of workers
1861	512	254	766	1,629
1911	360	137	497	1,667
1938	...	...	150	3,000
1947	160	25	185	....

A similar development occurred in the Netherlands shoe industry. On January 1, 1947, there were 120 shoe factories, employing 25 workers or more, of which 102 were centred in North Brabant. The total number of workers employed by these enterprises was approximately 12,000 and 9,000, respectively.

In 1929 the Netherlands production of shoes amounted to 9 million pairs, while in 1939 this figure had gone up to 18 million, an increase of 100 per cent. During the war the production was small, but in 1947 the 1939 level was again reached.

Leather Manufactures Generally of Good Quality

Shoes and other leather articles manufactured in the Netherlands are, on the whole, of good quality. The shoe factories are equipped with modern machinery and all types of footwear are produced. One of the principal lines made by the leather industry is belting. Other manufactures include ladies' bags, suitcases, brief cases, gloves, work gloves, and sporting goods.

As a result of the steadily increasing mechanization of the industry, exports became more important. In 1909, 42 shoe factories in North Brabant shipped a total quantity of 330,000 pairs of shoes, boots and slippers abroad. Owing to the growing competition in various foreign markets, however, exports of shoes from the Netherlands gradually declined, the total exports in 1936 being only 42,545 pairs. After the depreciation of the guilder in September, 1936, prices quoted by Netherlands producers became more competitive and shipments abroad in 1939 rose to 359,216 pairs. In 1947, 176,321 pairs were exported.

Prior to 1932 there were also very large imports of leather shoes, boots, and slippers into the Netherlands. Cheap lines were imported mainly from Czechoslovakia. Due to quota restrictions, placed on the importation of footwear by the Netherlands Government in 1932, arrivals from foreign sources fell considerably, from 5,821,972 pairs in 1931 to 1,691,404 pairs in 1939. Imports in 1946 and 1947 amounted to 388,089 and 566,723 pairs, respectively, the principal suppliers during the latter year being Spain (141,731 pairs), the United States (102,325 pairs), Switzerland (92,538 pairs), Great Britain (76,117 pairs), Netherlands East Indies (72,390 pairs), Czechoslovakia (48,900 pairs), and Belgium/Luxembourg (22,647 pairs). Arrivals from Canada totalled 9,492 pairs.

Important Prewar Trade in Hides and Skins

Before the war there was an important trade in hides and skins in the Netherlands, the main centres being Amsterdam and Rotterdam. One reason for this was that domestic hides were not suitable for all purposes, so that foreign hides were purchased by Netherlands dealers for processing and for subsequent re-export as raw materials or semi-manufactured products.

During the last ten years preceding the war imports of all types of salted and dried cow, buffalo, and horse hides as well as calf skins averaged 33,000 metric tons per annum, against average annual exports of 25,000 metric tons. In 1946 hide imports amounted to 19,000 metric tons, while exports weighed only 55 metric tons. The respective figures for 1947 are 22,416 and 230 metric tons.

Imported Tanning Materials Again Being Used

Prior to 1940, a great part of the tanning material requirements was purchased abroad. During the period 1940-45, when practically all foreign sources of supply were cut off, the consumption of synthetic tanning materials increased considerably. At present, however, imported products are again being used. Specifically, Netherlands tanning materials include formic acid, sulphate of sodium, oxalic acid, foot-oil, talc and castor oil.

For the manufacture of light leather belting, domestic cow hides are used, while the heavy types are mostly made of chrome tanned buffalo hides from the Netherlands East Indies. During the last few years before the war, Netherlands exports of leather belting averaged 160,000 metric tons per annum with average annual imports of 10,000 metric tons. In 1946 these figures were only 4 and 13 metric tons and, in 1947, 71 and 11 metric tons, respectively.

As far as other leather articles are concerned, these are produced chiefly for the domestic market. Only small quantities of gloves and ladies' handbags were sent abroad prior to 1940. In 1946 and 1947 only 1½ per cent of the total sales of leather goods were to foreign markets, except for exports of footwear and leather belting, which were approximately Fl.22,000,000 and Fl.29,000,000 respectively. By constantly improving the quality it is hoped, however, that more leather goods will find an outlet in foreign markets.

Trade Commissioners on Tour

CANADIAN Trade Commissioners return periodically from their posts in foreign lands to familiarize themselves with conditions in this country and the special requirements of the commercial community. They are in a position to furnish information concerning markets in their respective territories and possible sources of supply. Exporters and importers are urged to communicate with these officers, when in their vicinity, and to discuss the promotion of their particular commercial interests, now and in the future. Arrangements for interviews with these trade commissioners should be made directly through the following trade associations in the areas concerned:

Ottawa—Foreign Trade Service, Department of Trade and Commerce

Calgary—Board of Trade.
Charlottetown—Board of Trade.
Edmonton—Canadian Manufacturers' Association.
Fredericton—Chamber of Commerce.
Halifax—Board of Trade.
Hamilton—Chamber of Commerce.
Montreal—Montreal Board of Trade.
Pembroke—Chamber of Commerce.
Quebec City—Board of Trade.
Regina—Chamber of Commerce.
Saint John—Board of Trade.
Toronto—Canadian Manufacturers' Association.
Vancouver—H. W. Brighton, Department of Trade and Commerce, 355 Burrard Street.
Winnipeg—Canadian Manufacturers' Association.

R. G. C. Smith, Commercial Secretary for Canada in Havana for the past two years, is touring those sections of this country that are principally concerned in exports to the southern market. On completion of his tour, he will sail for Rome to which he has been posted as Commercial Secretary for Canada.

Saint John—August 24-26.
Halifax—August 27-September 2.
Charlottetown—September 3-4.
Penticton—September 13-14.
Vancouver—September 16-21.

M. B. Palmer, Canadian Trade Commissioner in Kingston, Jamaica, has returned to this country on tour, which commenced in Montreal on June 14, 1948. He will discuss with interested businessmen factors affecting trade relations between this country and Jamaica.

Winnipeg—August 9.
Calgary—August 12.

Many countries, especially those in Latin America, require, for the purpose of calculating duties, consular invoices which may be obtained from the consul of the country concerned, and after being meticulously completed by the shipper, be submitted to consul for certification. Certain countries may require certificates of origin in addition to the consular invoice, and these too may have to be certified. In other countries the consular invoice includes the certificate of origin. These documents must be filled out with utmost care, as even a slight mistake may result in a heavy fine being imposed on the importer. The number of consular forms that must be viséd varies with different countries as do the fees that are charged for the visés. (*See our ABC of Canadian Export Trade, page 22.*)

Trade and Tariff Regulations

British Guiana Import Control Regulations Changed

Port of Spain, July 13, 1948.—(FTS)—The Controller of Supplies and Prices, British Guiana, advised importers on July 8 that applications for licences to import feather pillows from North America at a ceiling price of $2 per pair would be received for consideration on the basis of the average imports during 1944-47.

In a notice of July 10, the Controller announced that all kinds of men's, women's and children's hats were added to the list of commodities for which licences will not be granted on hard currency sources.

United Kingdom Modifies Open General Licence for Certain Magazines

London, July 12, 1948.—(FTS)—The Import Licensing Department today issued Notice to Importers No. 293, reading, in part, as follows:

> "In Notice to Importers No. 281, the Board of Trade announced that the Open General Licence for periodicals, magazines and the like had been amended to exclude these goods unless they are imported as single copies through the post by persons who pay, or have paid, the overseas suppliers for them either directly or through their own banks. The Open General Licence has now been further amended to exclude periodicals, magazines and the like imported as single copies through the post unless (*a*) these are imported by persons who pay, or have paid, their overseas suppliers direct and not through an agent, or (*b*) they are of learned, scientific, technical or religious nature, or printed exclusively in a foreign language, and an agent arranging for the import of the single copies on behalf of a number of importers has been authorized by the Board of Trade to make arrangements for payment on behalf of such importers."

The remainder of the notice deals with procedure where magazines, etc., are permitted importation under part (*b*) above through an agent.

Tariff-rate Quota for Potato Imports Into United States Nearly Filled

Washington, July 21, 1948.—(FTS)—Preliminary figures issued by the United States Treasury Department show that on July 3 the tariff-rate quota for the year beginning September 15, 1947, of two and a half million bushels of certified seed potatoes was approximately 99·3 per cent filled. On the same date the corresponding quota of one million bushels of table potatoes was approximately 88·2 per cent filled.

United Kingdom Government to Assist Film Industry

London, July 23, 1948.—(FTS)—The United Kingdom Government is to provide money to overcome the existing handicaps to the development of the film industry. A Film Finance Corporation is to be created which will have at its disposal a sum of £5,000,000. It will have the power to lend money on reasonable commercial terms for film production. It will not, in the initial stages at least, be lent directly to producers but to distributing companies who in turn will use the money to assist in providing finance to producers. Later it may be practicable for the Corporation to help the finance of experiments in methods of production and distribution.

The Board of Trade state that the present position of the film industry is abnormal. The independent producers in particular who are building up their production have not yet had the chance to establish the necessary working capital after the dislocation caused by the war. The present arrangements are designed to help the industry overcome these difficulties.

Ocean-Going Sailing Schedules

Information contained in the following list of sailings, such as destination, port of departure, loading date, name of ship and operator, is furnished by steamship companies and agents concerned. This is the latest available and subject to change after *Foreign Trade* has gone to press, particularly as this relates to the loading date and name of vessel.

The loading date and name of ship are not indicated in some instances, due to the fact that on certain routes information available is not sufficiently definite to mention the steamer that will be placed on a berth for the destination shown. The name of the probable operator is given, however, and exporters should seek further particulars from the operator or agent indicated.

Departures from Montreal

*Calls at Halifax about four days later.
†Calls at Quebec about three days later.
(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Aden—			
Port Aden	August 24–28	*Melampus*	Cunard Donaldson
Africa-East—			
Lourenço Marques	August 1–14	*Fantee*	Elder Dempster
Lourenço Marques	August 6–10	*Cumberland County*	March Shipping
Lourenço Marques	August 8–18	*Cabano*	Elder Dempster
Lourenço Marques	August 18–28	*Daltonhall*	Elder Dempster
Lourenço Marques	August 25–28	*Vancouver County*	March Shipping
Lourenço Marques	Aug. 28–Sept. 8	*Freetown*	Elder Dempster
Lourenço Marques	September 9–20	*Cargill*	Elder Dempster
Lourenço Marques	September 21–25	*Yarmouth County*	March Shipping
Beira	August 18–28	*Daltonhall*	Elder Dempster
Beira	September 9–20	*Cargill*	Elder Dempster
Lourenço Marques, Beira, Mombasa	August 14	*Angusglen*	Kerr Steamships
Lourenço Marques, Beira, Mombasa	September 2	*Norden*	Kerr Steamships
Africa-South—			
Cape Town, Port Elizabeth, East London, Durban	August 1–14	*Fantee*	Elder Dempster
	August 6–10	*Cumberland County*	March Shipping
	August 8–18	*Cabano*	Elder Dempster
	August 14	*Angusglen*	Kerr Steamships
	August 18–28	*Daltonhall*	Elder Dempster
	August 25–28	*Vancouver County*	March Shipping
	Aug. 25–Sept. 8	*Freetown*	Elder Dempster
	September 2	*Norden*	Kerr Steamships
	September 9–20	*Cargill*	Elder Dempster
	September 21–25	*Yarmouth County*	March Shipping
Argentina—			
Buenos Aires	August 16–18	*Bowplate*	Cunard Donaldson
Buenos Aires	August 20–29	†*Royston Grange*	Furness Withy
Buenos Aires	August 28–29	*Mormactide*	Montreal Shipping
Australia—			
Brisbane, Sydney, Newcastle, Geelong, Melbourne	September 6–10	*Port Caroline*	Montreal Australia New Zealand Line

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Belgian Congo—			
Matadi	September 21–25	*Yarmouth County*	March Shipping
Belgium—			
Antwerp	August 7–14	*Beckenham*	Cunard Donaldson
Antwerp	August 10	*Hemsefjell*	Brock Shipping
Antwerp	August 14	*Prins Johan Willem Friso*	Shipping Limited
Antwerp	August 14	*Brant County*	Canada Steamships
Antwerp	August 18	*Prins Willem IV*	Shipping Limited
Antwerp	August 22	*Hada County*	Canada Steamships
Antwerp	August 22–28	*Beaverdell* (r)	Canadian Pacific
Antwerp	August 22–28	*Westralia*	Montreal Shipping
Antwerp	August 24–30	*Tunaholm*	Swedish American
Antwerp	August 30	*Prins Alexander*	Shipping Limited
Antwerp	Aug. 30–Sept. 3	†*Sein*	Furness Withy
Antwerp	August 31	*Kent County*	Canada Steamships
Antwerp	September 3–10	*Beaconsfield*	Cunard Donaldson
Antwerp	September 8	*Prins Maurits*	Shipping Limited
Antwerp	September 11	*Hedel*	Shipping Limited
Antwerp	September 11–18	*Anatina*	March Shipping
Antwerp	September 12	*Grey County*	Canada Steamships
Antwerp	September 15	*Prins Johan Willem Friso*	Shipping Limited
Brazil—			
Rio de Janeiro	August 16–18	*Bowplate*	Cunard Donaldson
Santos	August 20–25	†*Royston Grange*	Furness Withy
	August 28–29	*Mormactide*	Montreal Shipping
Ceylon—			
Colombo	August 15–20	*City of Agra*	McLean Kennedy
Colombo	August 25–30	*A Ship*	March Shipping
Colombo	September 1–5	*City of Chelmsford*	McLean Kennedy
Colombo	September 4	*Höegh Silverwave*	Kerr Steamships
China—			
Shanghai	August 5–10	*City of Poona*	McLean Kennedy
Shanghai	August 7–10	*Ajax*	Cunard Donaldson
Shanghai	September 15	*City of Lucknow*	McLean Kennedy
Colombia—			
Barranquilla	August 9–12	*Benny* (r)	Saguenay Terminals
Barranquilla	August 10–15	*Sunray*	Saguenay Terminals
Barranquilla	September 2–5	†*Shakespeare Park*	Saguenay Terminals
Barranquilla	August 12–13	*Polykarp*	Swedish American
Barranquilla	August 23–24	*Laholm*	Swedish American
Cuba—			
Havana, Santiago	August 25–30	*Danaholm*	Swedish American
Denmark—			
Copenhagen	August 24–30	*Tunaholm*	Swedish American
Copenhagen	August 30–31	*Bergamo*	Swedish American
Eire—			
Dublin	August 18–22	*Lord O'Neill*	McLean Kennedy
Dublin	September 2	*Fanad Head*	McLean Kennedy
Dublin	September 8	*Irish Ash*	Shipping Limited
Cork	September 24	*Irish Larch*	Shipping Limited
Egypt—			
Alexandria, Port Said, Suez	August 24–28	*Melampus*	Cunard Donaldson
	September 18–22	*Sloterdyk*	Cunard Donaldson
Alexandria	September 4	*Höegh Silverwave*	Kerr Steamships
Finland—			
Helsinki	August 24–30	*Tunaholm*	Swedish American
Helsinki	August 30–31	*Bergamo*	Swedish American
Fiume	August 13–15	*Radnik*	Furness Withy

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
France—			
Le Havre	August 14	*Brant County*	Canada Steamships
Le Havre	August 22	*Hada County*	Canada Steamships
Le Havre	August 24–30	*Tunaholm*	Swedish American
Le Havre	August 31	*Kent County*	Canada Steamships
Le Havre	Aug. 30–Sept. 3	†*Sein*	Furness Withy
Le Havre	September 12	*Grey County*	Canada Steamships
Marseilles	September 2–5	*Capo Vita*	Furness Withy
Germany—			
Hamburg	August 7–14	*Beckenham*	Cunard Donaldson
Hamburg	August 22–28	*Westralia*	Montreal Shipping
Hamburg	August 24–30	*Tunaholm*	Swedish American
Hamburg	September 3–10	*Beaconsfield*	Cunard Donaldson
Hamburg	September 11–18	*Anatina*	March Shipping
Gibraltar	August 24–31	*Mont Gaspe*	Montreal Shipping
	September 1–8	*Liguria*	Montreal Shipping
Greece—			
Piraeus	September 1-8	*Liguria*	Montreal Shipping
Haiti—			
Port au Prince	September 2–5	*Shakespeare Park*	Saguenay Terminals
Hong Kong	August 5–10	*City of Poona*	McLean Kennedy
	August 7–10	*Ajax*	Cunard Donaldson
	September 15	*City of Lucknow*	McLean Kennedy
India and Pakistan—			
Karachi	August 5–10	*Gulfside*	March Shipping
Bombay	August 15–20	*City of Agra*	McLean Kennedy
Madras	August 25–30	*A Ship*	March Shipping
Calcutta	September 1–5	*City of Chelmsford*	McLean Kennedy
	September 4	*Höegh Silverwave*	Kerr Steamships
Chittagong	August 25–30	*A Ship*	March Shipping
Italy—			
Naples	August 16–22	*Italo Marsano*	Montreal Shipping
Genoa	August 24–31	*Mont Gaspe*	Montreal Shipping
	September 1–8	*Liguria*	Montreal Shipping
West Coast Ports	September 2–5	*Capo Vita*	Furness Withy
Malaya—			
Penang	August 24–28	*Melampus*	Cunard Donaldson
Port Swettenham	September 18–22	*Sloterdyk*	Cunard Donaldson
Mediterranean—			
Central and Western	August 16–22	*Italo Marsano*	Montreal Shipping
	August 24–31	*Mont Gaspe*	Montreal Shipping
	September 1–8	*Liguria*	Montreal Shipping
Mexico—			
Tampico	August 28	*Salen*	Federal Commerce
Veracruz			
Veracruz	August 25–30	*Danaholm*	Swedish American
Netherlands—	August 7–14	*Beckenham*	Cunard Donaldson
	August 14	*Prins Johan Willem Friso*	Shipping Limited
Amsterdam	August 18	*Prins Willem IV*	Shipping Limited
Rotterdam	August 30	*Prins Alexander*	Shipping Limited
	September 3–10	*Beaconsfield*	Cunard Donaldson
	September 8	*Prins Maurits*	Shipping Limited
	September 11	*Hedel*	Shipping Limited
	September 14	*Prins Johan Willem Friso*	Shipping Limited
Rotterdam	August 10	*Hemsefjell*	Brock Shipping
Rotterdam	August 14	*Brant County*	Canada Steamships
Rotterdam	August 22	*Hada County*	Canada Steamships
Rotterdam	August 22–28	*Westralia*	Montreal Shipping
Rotterdam	August 24–30	*Tunaholm*	Swedish American

Departures from Montreal—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—Con.			
Rotterdam	August 31	*Kent County*	Canada Steamships
Rotterdam	September 11–18	*Anatina*	March Shipping
Rotterdam	September 12	*Grey County*	Canada Steamships
Netherlands East Indies—			
Batavia, Soerabaya	August 24–28	*Melampus*	Cunard Donaldson
Samarang, Cheribon	September 18–22	*Sloterdyk*	Cunard Donaldson
Netherlands West Indies—			
Curaçao	August 9–12	†*Benny* (r)	Saguenay Terminals
Curaçao	August 12–13	*Polykarp*	Swedish American
Curaçao	August 23–24	*Laholm*	Swedish American
Newfoundland—			
St. John's	August 7–10	*Wellington Kent*	Furness Withy
St. John's	August 21–24	*Wellington Kent*	Furness Withy
St. John's	September 4–7	*Wellington Kent*	Furness Withy
St. John's	September 18–21	*Wellington Kent*	Furness Withy
New Zealand—			
Auckland, Wellington, Lyttelton, Dunedin	August 21–29	*Port Phillip*	Montreal Australia New Zealand.
Northern Ireland—			
Belfast	August 27	*Torr Head*	McLean Kennedy
Norway—			
Oslo, Kristiansand, Stavanger, Bergen	August 24–30	*Tunaholm*	Swedish American
	August 30–31	*Bergamo*	Swedish American
Oslo, Stavanger, Bergen	August 18	*Ornefjell*	Brock Shipping
Philippines—			
Manila	August 5–10	*City of Poona*	McLean Kennedy
Manila	August 7–10	*Ajax*	Cunard Donaldson
Manila	September 15	*City of Lucknow*	McLean Kennedy
Poland—			
Gdansk	August 24–30	*Tunaholm*	Swedish American
Gdansk	August 30–31	*Bergamo*	Swedish American
Portugal—			
Lisbon	August 24–31	*Mont Gaspe*	Montreal Shipping
Lisbon	September 1–8	*Liguria*	Montreal Shipping
St. Pierre et Miquelon	August 7–10	*Wellington Kent*	Furness Withy
	August 21–24	*Wellington Kent*	Furness Withy
	September 4–7	*Wellington Kent*	Furness Withy
	September 18–21	*Wellington Kent*	Furness Withy
Singapore	August 24–28	*Melampus*	Cunard Donaldson
	September 18–22	*Sloterdyk*	Cunard Donaldson
Sweden—			
Gothenburg, Malmo, Norrkoping, Stockholm	August 24–30	*Tunaholm*	Swedish American
	August 30–31	*Bergamo*	Swedish American
Trieste	August 16–22	*Italo Marsano*	Montreal Shipping
United Kingdom—			
Avonmouth	August 4–10	*Moveria*	Cunard Donaldson
Avonmouth	August 11–18	*Delilian*	Cunard Donaldson
Avonmouth	Aug. 27–Sept. 1	*Norwegian*	Cunard Donaldson

Departures from Montreal—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom— Con.			
Bristol	August 13–16	*New York City*	Furness Withy
Glasgow	August 12–19	*Laurentia*	Cunard Donaldson
Glasgow	Aug. 27–Sept. 2	*Dorelian* (r)	Cunard Donaldson
Hull	August 21	*Consuelo* (r)	McLean Kennedy
Leith	August 16–20	*Cairnesk*	Furness Withy
Leith	Aug. 30–Sept. 4	*Cairnvalona*	Furness Withy
Leith	September 4–8	*Cairnavon*	Furness Withy
Liverpool	August 7–10	*Ascania* (r)	Cunard Donaldson
Liverpool	August 14	*Empress of Canada* (r)	Canadian Pacific
Liverpool	August 15–19	*Beaverford*	Canadian Pacific
Liverpool	August 18–22	*Lord O'Neill*	McLean Kennedy
Liverpool	August 19–25	*Fort Musquarro*	Cunard Donaldson
Liverpool	August 22–29	*Beaverburn*	Canadian Pacific
Liverpool	August 27	*Torr Head*	McLean Kennedy
Liverpool	September 2	*Fanad Head*	McLean Kennedy
Liverpool	September 4	*Empress of Canada* (r)	Canadian Pacific
Liverpool	September 11	*Empress of France* (r)	Canadian Pacific
London	August 6–12	*Sibley Park*	Cunard Donaldson
London	August 10	*Hemsefjell*	Brock Shipping
London	August 9–17	*Arabia* (r)	Cunard Donaldson
London	August 19–24	*Beaverbrae*	Canadian Pacific
London	August 22–28	*Beaverdell* (r)	Canadian Pacific
London	September 1–7	*Fort Cadotte*	Cunard Donaldson
Manchester	August 11–14	*Manchester Trader* (r)	Furness Withy
Manchester	August 18–21	*Manchester Port* (r)	Furness Withy
Manchester	August 25–28	*Manchester Shipper* (r)	Furness Withy
Manchester	September 1–4	*Manchester City* (r)	Furness Withy
Newcastle	August 16–20	*Cairnesk*	Furness Withy
Newcastle	Aug. 30–Sept. 4	*Cairnvalona*	Furness Withy
Newcastle	September 4–8	*Cairnavon*	Furness Withy
Swansea	August 4–11	*Moveria* (r)	Cunard Donaldson
Swansea	August 13–16	*New York City*	Furness Withy
Uruguay—			
Montevideo	August 16–18	*Bowplate*	Cunard Donaldson
Montevideo	August 20–25	†*Royston Grange*	Furness Withy
Montevideo	August 28–29	*Mormactide*	Montreal Shipping
Venezuela—			
La Guaira	August 9–12	†*Benny* (r)	Saguenay Terminals
Maracaibo	August 12–13	*Polykarp*	Swedish American
	August 23–24	*Laholm*	Swedish American
La Guaira	August 23–24	*Laholm*	Swedish American
Puerto Cabello	September 12–13	†*Shakespeare Park*	Saguenay Terminals
La Guaira	August 10–15	*Sunray*	Saguenay Terminals
West Indies—			
Bermuda, Antigua, Barbados, Grenada, St. Kitts, St. Lucia, St. Vincent, Trinidad, Dominica, Montserrat, British Guiana	August 10–17	**Canadian Constructor* (r)	Canadian National
	August 17–26	**Alcoa Pilgrim*	Alcoa Steamships
	Aug. 27–Sept. 3	*Canadian Cruiser* (r)	Canadian National
	September 9–17	**Canadian Challenger* (r)	Canadian National
Jamaica	August 25–30	*Danaholm*	Swedish American
Bahamas, Jamaica	August 18	*Canadian Leader*	Canadian National
	August 27	*Canadian Conqueror*	Canadian National
	September 9–17	**Canadian Challenger* (r)	Canadian National
	September 10	**Canadian Observer*	Canadian National
	September 20	*Canadian Victor*	Canadian National

Departures from Quebec

Destination	Loading Date	Vessel	Operator or Agent
Netherlands—			
Rotterdam	August 21–22	*Kota Inten*	Furness Withy
Amsterdam	August 28–29	*Tabinta*	Furness Withy
United Kingdom—			
Liverpool	August 15–18	*Beaverbrae*	Canadian Pacific

Departures from Halifax

*Sails from Saint John about three days earlier.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Cuba—			
Santiago	August 8–10	*Dufferin Bell*	Pickford and Black
Santiago	August 21–25	*Lake Traverse*	Pickford and Black
Iceland—			
Reykjavik	August 16–18	*Trollafoss*	F. K. Warren
Newfoundland—			
St. John's	August 10–13	*Fort Amherst*	Furness Withy
St. John's	August 11–13	*Mary Sweeney*	Newfoundland Canada
St. John's	August 16	*Mayhaven*	Shaw Steamships
St. John's	August 17–19	*Atlantic Charter*	Montreal Shipping
St. John's	August 17–20	*Fort Townshend*	Furness Withy
St. John's	August 21–24	*Nova Scotia*	Furness Withy
St. John's	August 24–26	*Mary Sweeney*	Newfoundland Canada
St. John's	September 3–6	*Fort Amherst*	Furness Withy
St. John's	September 7–10	*Newfoundland*	Furness Withy
St. John's	September 21–24	*Nova Scotia*	Furness Withy
Corner Brook	August 17–19	*Mary Sweeney*	Newfoundland Canada
St. Pierre et Miquelon—	August 16	*Mayhaven*	Shaw Steamhips
	August 17–19	*Atlantic Charter*	Montreal Shipping
United Kingdom—			
Liverpool	August 21–24	*Nova Scotia*	Furness Withy
Liverpool	September 7–10	*Newfoundland*	Furness Withy
Liverpool	September 21–24	*Nova Scotia*	Furness Withy
Southampton	August 27	*Aquitania*	Cunard Donaldson
Southampton	September 18	*Aquitania*	Cunard Donaldson
West Indies—			
Bermuda	August 17–20	*Fort Amherst*	Furness Withy
Bermuda	August 24–27	*Fort Townshend*	Furness Withy
Bermuda	September 10–13	*Fort Amherst*	Furness Withy
Jamaica	August 8–10	*Dufferin Bell*	Pickford and Black
Jamaica	August 21–25	*Lake Traverse*	Pickford and Black
Bermuda, Antigua, Barbados, Grenada, St. Kitts, St. Lucia, St. Vincent, Trinidad, Dominica, Montserrat, British Guiana	August 22–31	**Lady Nelson* (r)	Canadian National
	September 4–12	**Lady Rodney* (r)	Canadian National

Departures from Saint John

Destination	Loading Date	Vessel	Operator or Agent
British Honduras—			
Belize	August 11–12	*Fort Panmure*	Saguenay Terminals
Canal Zone—			
Cristobal	August 11–12	*Fort Panmure*	Saguenay Terminals
Colombia—			
Barranquilla	September 12–13	*Shakespeare Park*	Saguenay Terminals
Dominican Republic—			
Ciudad Trujillo	August 11–12	*Fort Panmure*	Saguenay Terminals
Ciudad Trujillo	September 12–13	*Shakespeare Park*	Saguenay Terminals
Guatemala—			
Puerto Barrios	August 11–12	*Fort Panmure*	Saguenay Terminals
Haiti—			
Port au Prince	August 11–12	*Fort Panmure*	Saguenay Terminals
Port au Prince	September 12–13	*Shakespeare Park*	Saguenay Terminals
Venezuela—			
La Guaira, Puerto Cabello	September 12–13	*Shakespeare Park*	Saguenay Terminals

Departures from Vancouver

Ships listed under "Departures from Vancouver" may possibly be loading in addition at New Westminster. Exporters should communicate with agents in Vancouver to obtain information concerning loading dates, berths, available cargo space and rates.

(r) Indicates refrigerated cargo space.

Destination	Loading Date	Vessel	Operator or Agent
Africa-East—			
Lourenço Marques	August 19	*Overijsel*	Dingwall Cotts
Beira	September 7	*Silversandal*	Dingwall Cotts
Lourenço Marques	Aug. 25–Sept. 9	*Vedby*	North Pacific
Africa-South—			
Cape Town	August 19	*Overijsel*	Dingwall Cotts
Port Elizabeth	Aug. 25–Sept. 9	*Vedby*	North Pacific
East London, Durban	September 7	*Silversandal*	Dingwall Cotts
Walvis Bay	Aug. 25–Sept. 9	*Vedby*	North Pacific
Argentina—			
Rosario	August 29	*Hindanger*	Empire Shipping
Buenos Aires	September 29	*Falkanger*	Empire Shipping
Australia—			
Sydney	September 10	*Aorangi*	Canadian Australasian
Belgium—			
Antwerp	August 25	*Brest*	Empire Shipping
Antwerp	August 26	*Golden Gate* (r)	Gardner Johnson
Antwerp	September	*Pont Leveque*	Empire Shipping
Antwerp	September 26	*Argentina*	Gardner Johnson
Canal Zone—			
Balboa, Cristobal	August 23	*Coastal Nomad*	Gardner Johnson
Balboa	August 22	*Santa Leonor* (r)	Gardner Johnson
Balboa	September 8	*Santa Juana* (r)	Gardner Johnson

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Ceylon—			
Colombo	August 16–17	*Washington Mail*	American Mail Line
Colombo	August 18	*Silverguava*	Dingwall Cotts
Colombo	September 10	*Höegh Merchant*	Dingwall Cotts
Colombo	September 5	*Lombok*	Dingwall Cotts
Colombo	September 18	*Samarinda*	Dingwall Cotts
Chile—			
Valparaiso	August 29	*Hindanger*	Empire Shipping
	September 29	*Falkanger*	Empire Shipping
Arica, Antofagasta, Valparaiso	August 22	*Santa Leonor* (r)	Gardner Johnson
	September 8	*Santa Juana* (r)	Gardner Johnson
China—			
Shanghai, Tsingtao, Taku Bar	August 20–21	*India Mail*	American Mail Line
Shanghai, Taku Bar	August 24	*Vilja*	Empire Shipping
	September 28	*Vingnes*	Empire Shipping
Shanghai	August 12–13	*Oregon Mail* (r)	American Mail Line
Shanghai	August 27–28	*China Mail*	American Mail Line
Colombia—			
Barranquilla	August 20	*Don Anselmo* (r)	Empire Shipping
Barranquilla	August 23	*Coastal Nomad*	Gardner Johnson
Barranquilla	September 17	*Glimmeren*	Empire Shipping
Buenaventura	August 22	*Santa Leonor* (r)	Gardner Johnson
Buenaventura	September 8	*Santa Juana* (r)	Gardner Johnson
Ecuador—			
Guayaquil	August 22	*Santa Leonor* (r)	Gardner Johnson
Guayaquil	September 8	*Santa Juana* (r)	Gardner Johnson
Egypt—			
Alexandria	August 5–20	*Lake Tatla*	Canada Shipping
Fiji Islands—			
Suva	August 13	*Thor I*	Empire Shipping
Suva	September 10	*Aorangi*	Canadian Australasian
France—			
Le Havre	August 25	*Brest*	Empire Shipping
Le Havre	September	*Pont Leveque*	Empire Shipping
Greece—			
Piraeus	September	*Samuel Colt*	Empire Shipping
Piraeus	August 27	*Quachita Victory*	Anglo Canadian
Hawaii—			
Honolulu	September 10	*Aorangi*	Canadian Australasian
Hong Kong	August 14	*Francisville*	Balfour Guthrie
	August 20–21	*India Mail*	American Mail Line
	August 24	*Vilja*	Empire Shipping
	August 27–28	*China Mail*	American Mail Line
	September 28	*Vingnes*	Empire Shipping
India and Pakistan—			
Bombay, Calcutta	August 18	*Silverguava*	Dingwall Cotts
Bombay, Calcutta	September 5	*Lombok*	Dingwall Cotts
	September 18	*Samarinda*	Dingwall Cotts
Bombay, Karachi	September 10	*Höegh Merchant*	Dingwall Cotts
Italy—			
Genoa, Naples	September	*Samuel Colt*	Empire Shipping
Genoa	August 27	*Quachita Victory*	Anglo Canadian

Departures from Vancouver—*Continued*

Destination	Loading Date	Vessel	Operator or Agent
Japan—			
Yokohama	August 13–19	*Lake Kootenay*	Anglo Canadian
Yokohama	August 19–25	*Lake Sumas*	Canada Shipping
Yokohama	August 19–25	*Lake Athabasca*	Anglo Canadian
Yokohama	August 19–25	*Lake Pennask*	Anglo Canadian
Yokohama	August 20–21	*India Mail*	American Mail Line
Malaya—			
Penang	August 14	*Francisville*	Balfour Guthrie
Port Swettenham	August 18	*Silverguava*	Dingwall Cotts
Mexico—			
Manzanillo, Acapulco	August 23	*Coastal Nomad*	Gardner Johnson
Netherlands—			
Rotterdam	August 25	*Brest*	Empire Shipping
Rotterdam	September	*Pont Leveque*	Empire Shipping
Netherlands East Indies—			
Batavia	August 14	*Francisville*	Balfour Guthrie
Batavia	August 18	*Silverguava*	Dingwall Cotts
Soerabaya	September 5	*Lombok*	Dingwall Cotts
Soerabaya	September 10	*Höegh Merchant*	Dingwall Cotts
New Caledonia—			
Noumea	August 13	*Thor I*	Empire Shipping
New Hebrides—			
Port Vila	August 13	*Thor I*	Empire Shipping
New Zealand—			
Auckland	September 10	*Aorangi*	Canadian Australasian
Peru—			
Callao	August 29	*Hindanger*	Empire Shipping
Callao	September 29	*Falkanger*	Empire Shipping
Callao	August 22	*Santa Leonor* (r)	Gardner Johnson
Mollendo	September 8	*Santa Juana* (r)	Gardner Johnson
Persian Gulf	September 10	*Höegh Merchant*	Dingwall Cotts
Philippines—			
Manila	August 12–13	*Oregon Mail* (r)	American Mail Line
Iloilo	August 14	*Francisville*	Balfour Guthrie
Cebu	September 5	*Lombok*	Dingwall Cotts
Cebu	September 18	*Samarinda*	Dingwall Cotts
Manila	August 24	*Vilja*	Empire Shipping
Manila	September 10	*Höegh Merchant*	Dingwall Cotts
Manila, Cebu	August 18	*Silverguava*	Dingwall Cotts
Samoa—			
Apia	August 13	*Thor I*	Empire Shipping
Singapore	August 14	*Francisville*	Balfour Guthrie
Society Islands—			
Papeete	August 13	*Thor I*	Empire Shipping
Sweden—			
Stockholm	August 13	*La Plata* (r)	Gardner Johnson
Gothenburg	August 26	*Golden Gate* (r)	Gardner Johnson
Trieste	September 26	*Argentina* (r)	Gardner Johnson
Trieste	August 27	*Quachita Victory*	Anglo Canadian
Trieste	September	*Samuel Colt*	Empire Shipping
United Kingdom—			
Liverpool, Manchester	Aug. 22–Sept. 6	*Lake Atlin*	Canada Shipping

Departures from Vancouver—*Concluded*

Destination	Loading Date	Vessel	Operator or Agent
United Kingdom —Con.			
London	August 4–18	*Lake Cowichan*	Anglo Canadian
London	August 13	*LaPlata* (r)	Gardner Johnson
London	Aug. 18–Sept. 1	*Lake Nipigon*	Empire Shipping
London	August 26	*Golden Gate* (r)	Gardner Johnson
London	September 26	*Argentina* (r)	Gardner Johnson
Uruguay—			
Montevideo	August 29	*Hindanger*	Empire Shipping
Montevideo	September 29	*Falkanger*	Empire Shipping
Venezuela—			
Maracaibo	August 23	*Coastal Nomad*	Gardner Johnson
Maracaibo	August 20	*Don Anselmo* (r)	Gardner Johnson
La Guaira			
Puerto Cabello	September 17	*Glimmaren*	Empire Shipping

Canadian Shipments to Poland

The Polish Line (Zegluga Polska) and the Dutch Line (Polen Lijn N.V.) each offer fortnightly sailings from Rotterdam to Gdynia, while, according to the information received, there are no regular sailings at present from Hamburg to Gdynia-Gdansk. Canadian exporters are therefore advised that goods destined for Poland should be transhipped at Rotterdam and not Hamburg, as stated in the July 24th issue of *Foreign Trade.*

As an active exporter will have frequent occasion to make use of cable or radio, it is important to take advantage of any saving in expenditure and time that can be secured through the use of coded messages. The letterheads of most business firms list the commercial cable codes in which they are prepared to receive and send messages. Among the common commercial codes are ABC, Lieber, Bentley first or second phrase, Acme, etc., as well as a number of private codes. Any telegraph company can place these code books at the disposal of a customer, but if frequent messages are being sent, it will be found more convenient for an exporter to purchase his own code books. It will also be found desirable to have a cable address registered with the telegraph companies. This consists usually of one word in place of the full firm name and thus permits a reduction in cable expenses. In addition to coded messages, cable services offer several kinds of rates, depending on the time the message is sent and time required in delivery of message, such as deferred and full-rate messages, day messages, night messages, day letters, night letters, etc., of which full particulars and charges for each type may be obtained from any telegraph company. All cables are filed in Canada either with the Canadian Pacific Telegraphs or Canadian National Telegraphs, which maintain agency arrangements with all British and foreign communication companies operating in and out of Canada. (*See our ABC of Canadian Export Trade, page 24.*)

Foreign Trade Service Abroad

Cable address:—*Canadian*, unless otherwise shown.
Note.—Bentley's Second Phrase Code is used by Canadian Trade Commissioners.

Argentina

Buenos Aires—H. L. Brown, Commercial Secretary, Canadian Embassy, Bartolomé Mitre 478.
Territory includes Uruguay and Paraguay.

Buenos Aires—W. B. McCullough, Commercial Secretary (Agricultural Specialist), Canadian Embassy, Bartolomé Mitre 478.

Australia

Sydney—C. M. Croft, Commercial Counsellor for Canada, City Mutual Life Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.
Territory includes the Australian Capital Territory, New South Wales, Queensland, Northern Territory and Dependencies.

Sydney—Dr. W. C. Hopper, Commercial Secretary for Canada (Agricultural Specialist), City Mutual Building, Hunter and Bligh Streets. Address for letters: Post Office Box 3952V.

Melbourne—F. W. Fraser, Commercial Secretary for Canada, 83 William Street.
Territory includes States of Victoria, South Australia, Western Australia, and Tasmania.

Belgian Congo

Leopoldville—L. H. Ausman, Canadian Government Trade Commissioner, Forescom Building. Address for letters: Boîte Postale 373.
Territory includes Angola and French Equatorial Africa.

Belgium

Brussels—B. A. Macdonald, Commercial Secretary, Canadian Embassy, 46 rue Montoyer.

Brazil

Rio de Janeiro—Maurice Bélanger, Commercial Secretary, Canadian Embassy, Ed. Metropòle, Avenida Presidente Wilson 165. Address for letters: Caixa Postal 2164.

São Paulo—J. C. Depocas, Canadian Government Trade Commissioner, Canadian Consulate, Edificio Alois, Rua 7 de Abril 252. Address for letters: Caixa Postal 6034.

Chile

Santiago—E. H. Maguire, Acting Commercial Secretary, Canadian Embassy, Bank of London and South American Building. Address for letters: Casilla 771.
Territory includes Bolivia.

China

Shanghai—L. M. Cosgrave, Commercial Counsellor for Canada, 27 The Band. Postal District (0).

Colombia

Bogotá—H. W. Richardson, Acting Canadian Government Trade Commissioner, Edificio Colombiana de Seguros. Address for letters: Apartado 1618. Address for air mail: Apartado Aereo 3562.
Territory includes Republic of Panama and the Canal Zone.

Cuba

Havana—R. G. C. Smith, Commercial Secretary, Canadian Legation, Avenida de las Misiones 17. Address for letters: Apartado 1945.
Territory includes Haiti, Dominican Republic and Puerto Rico.

Egypt

Cairo—J. M. Boyer, Canadian Government Trade Commissioner, 22 Sharia Kasr el Nil. Address for letters: Post Office Box 1770.
Territory includes the Sudan, Palestine, Cyprus, Iraq, Syria and Iran.

France

Paris—J. P. Manion. Commercial Secretary, Canadian Embassy, 3 rue Scribe.
Territory includes Algeria, French Morocco and Tunisia.

Paris—J. H. Tremblay, Commercial Secretary (Agricultural Specialist), Canadian Embassy, 3 rue Scribe.
Territory includes Belgium, Denmark, France and the Netherlands.

Germany

Frankfurt—B. J. Bachand, Canadian Economic Representative, % Allied Contact Section, H.Q. EUCOM, Frankfurt, A.P.O. 757, U.S. Army.
Cable address, Canadian Frankfurt/Main.

Foreign Trade Service Abroad—Continued

Greece

Athens—T. J. Monty, Commercial Secretary, Canadian Embassy, 31 Vassilissis Sophias Avenue.
Territory includes Turkey.

Guatemala

Guatemala City—C. B. Birkett, Canadian Government Trade Commissioner, Post Office Box 400.
Territory includes Costa Rica, El Salvador, Honduras and Nicaragua.

Hong Kong

Hong Kong—K. F. Noble, Canadian Government Trade Commissioner, Hong Kong Bank Building. Address for letters: Post Office Box 126.
Territory includes South China, the Philippine Islands and French Indo-China.

India

New Delhi—Richard Grew, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 11.

Bombay—C. R. Gallow, Commercial Secretary for Canada, Gresham Assurance House, Mint Road. Address for letters: Post Office Box 886.
Territory includes Burma and Ceylon.

Ireland

Dublin—H. L. E. Priestman, Commercial Secretary for Canada, 66 Upper O'Connell Street.

Belfast—H. L. E. Priestman, Canadian Government Trade Commissioner, 36 Victoria Square.

Italy

Rome—A. P. Bissonnet, Acting Commercial Secretary, Canadian Embassy, Via Saverio Mercadante 15-17.
Territory includes Malta, Yugoslavia and Libya.

Jamaica

Kingston—R. V. N. Gordon, Acting Canadian Government Trade Commissioner, Canadian Bank of Commerce Chambers. Address for letters: Post Office Box 225.
Territory includes the Bahamas and British Honduras.

Mexico

Mexico City—D. S. Cole, Commercial Counsellor, Canadian Embassy, Edificio Internacional, Paseo de la Reforma. Address for letters: Apartado Num. 126-Bis.

Netherlands

The Hague—J. A. Langley, Commercial Counsellor, Canadian Embassy, Sophialaan 1-A.

Newfoundland

St. John's—R. Campbell Smith, Commercial Secretary, Office of the High Commissioner for Canada, Circular Road.

New Zealand

Wellington—P. V. McLane, Commercial Secretary, Office of the High Commissioner for Canada, Post Office Box 1660.
Territory includes Fiji and Western Samoa.

Norway

Oslo—S. G. MacDonald, Commercial Secretary, Canadian Legation, Fridtjof Nansens Plass 5.
Territory includes Denmark and Greenland.

Pakistan

Karachi—G. A. Browne, Acting Canadian Government Trade Commissioner, The Cotton Exchange, McLeod Road. Address for letters: Post Office Box 531.
Territory includes Afghanistan.

Peru

Lima—C. J. Van Tighem, Commercial Secretary, Canadian Embassy, Edificio Boza, Carabaya 831, Plaza San Martin. Address for letters: Casilla 1212.
Territory includes Ecuador.

Portugal

Lisbon—L. S. Glass, Canadian Government Trade Commissioner, Canadian Consulate General, Rua Rodrigo da Fonseca 103.
Territory includes the Azores and Madeira, Spain, Spanish Morocco, the Canary Islands and Gibraltar.

Singapore

Singapore—Paul Sykes, Canadian Government Trade Commissioner, Room D-2, Union Building. Address for letters: Post Office Box 845.
Territory includes Federation of Malaya, North Borneo, Brunei, Sarawak, Siam and Netherlands East Indies.

Foreign Trade Service Abroad—Concluded

South Africa

Johannesburg—S. V. Allen, Commercial Secretary for Canada, Mutual Buildings, Harrison Street. Address for letters: Post Office Box 715.
Territory includes Transvaal, Natal, Southern Rhodesia, Northern Rhodesia, Mozambique or Portuguese East Africa, Kenya, Nyasaland, Tanganyika and Uganda.
Cable address, Cantracom.

Cape Town—S. G. Tregaskes, Acting Commercial Secretary for Canada, New South African Mutual Buildings, 21 Parliament Street. Address for letters: Post Office Box 683.
Territory includes Cape Province, Orange Free State, South-West Africa, Mauritius and Madagascar.
Cable address, Cantracom.

Sweden

Stockholm—F. H. Palmer, Commercial Counsellor, Canadian Legation, Strandvägen 7-C. Address for letters: Post Office Box 14042.
Territory includes Finland.

Switzerland

Berne — Yves Lamontagne, Commercial Counsellor, Canadian Legation, Thunstrasse 95.
Territory includes Austria, Czechoslovakia and Hungary.

Trinidad

Port-of-Spain—A. W. Evans, Acting Canadian Government Trade Commissioner, Colonial Life Insurance Building. Address for letters: Post Office Box 125.
Territory includes Barbados, Windward and Leeward Islands, British Guiana, Dutch Guiana, French Guiana, and the French West Indies.

United Kingdom

London—A. E. Bryan, Commercial Counsellor, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Sleighing, London.

London—R. P. Bower, Commercial Secretary, Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Territory includes the South of England, East Anglia and British West Africa (Gold Coast, Sierra Leone and Nigeria).
Cable address, Sleighing, London.

London—W. B. Gornall, Commercial Secretary (Agricultural Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Cantracom, London.

London—R. D. Roe, Commercial Secretary (Timber Specialist), Office of the High Commissioner for Canada, Canada House, Trafalgar Square, S.W.1.
Cable address, Timcom, London.

Liverpool—M. J. Vechsler, Canadian Government Trade Commissioner, Martins Bank Building, Water Street.
Territory includes the Midlands, North of England and Wales.

Glasgow—J. L. Mutter, Canadian Government Trade Commissioner, 200 St. Vincent Street.
Territory covers Scotland and Iceland.
Cable address, Cantracom.

United States

Washington— J. H. English, Commercial Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

Washington—G. R. Paterson, Agricultural Counsellor, Canadian Embassy, 1746 Massachusetts Avenue, N.W.

New York City—M. T. Stewart, Canadian Government Trade Commissioner, British Empire Building, Rockefeller Centre.
Territory includes Bermuda.
Cable address, Cantracom.

Detroit—J. H. Hurley, Consul, Canadian Consulate, 1035 Penobscot Building, Detroit 26, Michigan.

Chicago—Edmond Turcotte, Consul-General for Canada, Suite 800, Chicago Daily News Building, 400 West Madison Street.

Los Angeles—V. E. Duclos, Canadian Government Trade Commissioner, Associated Realty Building, 510 West Sixth Street.

San Francisco—H. S. Scott, Consul General, Canadian Consulate General, 3rd floor, Kohl Building, 400 Montgomery Street, San Francisco.

Venezuela

Caracas—C. S. Bissett, Canadian Government Trade Commissioner. Address for letters: Canadian Consulate General, 8° Piso, Edificio America, Esq. Veroes.
Territory includes Netherlands West Indies.

Foreign Exchange Quotations

The following are nominal quotations, based on rates available in London or New York and converted into Canadian terms at the mid-rate for sterling or par for United States dollars, as furnished by the Foreign Exchange Division of the Bank of Canada. These quotations may be found useful in considering statistics and prices generally, but Canadian exporters are reminded that the kinds of currency which may be accepted for exports to different countries are specifically covered by the Foreign Exchange Control Act and Regulations, and that funds may sometimes be tendered in payment for exports, which cannot, in fact, be transferred to Canada. Both importers and exporters are advised to communicate with their bankers before completing financial arrangements for the sale or purchase of commodities, to ensure that the method of payment contemplated is not only possible but that it is in accordance with the Foreign Exchange Control Act and Regulations.

Country	Monetary Unit		Nominal Quotations Ju'y 26	Nominal Quotations Aug. 3
Argentina	Peso	Off.	·2977	·2977
		Free	·2065	·2085
Australia	Pound	....	3·2240	3·2240
Belgium and Belgian Congo	Franc	....	·0228	·0228
Bolivia	Boliviano	....	·0238	·0238
British West Indies (except Jamaica)	Dollar	....	·8396	·8396
Brazil	Cruzerio	....	·0544	·0544
Chile	Peso	Off.	·0517	·0517
		Export	·0322	·0322
Colombia	Peso	....	·5714	·5714
Cuba	Peso	....	1·0000	1·0000
Czechoslovakia	Koruna	....	·0200	·0200
Denmark	Krone	....	·2083	·2083
Ecuador	Sucre	....	·0740	·0740
Egypt	Pound	....	4·1330	4·1330
Eire	Pound	....	4·0300	4·0300
Fiji	Pound	....	3·6306	3·6306
Finland	Markka	....	·0073	·0073
France and French North Africa	Franc	Off.	·0046	·0046
		Free	.0032	.0032
French Empire—African	Franc	....	·0079	·0079
French Pacific Possessions	Franc	....	·0201	·0201
Haiti	Gourde	....	·2000	·2000
Hong Kong	Dollar	....	·2518	·2518
Iceland	Krona	....	·1541	·1541
India	Rupee	....	·3022	·3022
Iraq	Dinar	....	4·0300	4·0300
Italy	Lira	....	·0017	·0017
Jamaica	Pound	....	4·0300	4·0300
Malaya	Dollar	....	·4701	·4701
Mexico	Peso	....	.....	.....
Netherlands	Florin	....	·3769	·3769
Netherlands East Indies	Florin	....	·3769	·3769
Netherlands West Indies	Florin	....	·5302	·5302
New Zealand	Pound	....	3·2402	3·2402
Norway	Krone	....	·2015	·2015
Pakistan	Rupee	....	·3022	·3022
Palestine	Pound	....	4·0300	4·0300
Peru	Sol	....	·1538	·1538
Philippines	Peso	....	·5000	·5000
Portugal	Escudo	....	·0403	·0403
Siam	Baht	....	·1000	·1000
Spain	Peseta	....	·0916	·0916
Sweden	Krona	....	·2783	·2783
Switzerland	Franc	....	·2336	·2336
Turkey	Pound	....	·3571	·3571
Union of South Africa	Pound	....	4·0300	4·0300
United Kingdom	Pound	....	4·0300	4·0300
United States	Dollar	....	1·0000	1·0000
Uruguay	Peso	Controlled	·6583	·6583
		Uncontrolled	·5618	·5618
Venezuela	Bolivar	....	·2985	·2985